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LarrainVial and inCadense join forces to advance next-generation wealth infrastructure across LatAm

The collaboration combines LarrainVial's regional distribution leadership with inCadense's international SMA, UMA and multi-currency managed accounts platform to support the transition toward fee-based wealth solutions

BY **DAVID GUTIERREZ**



inCadense Corp., a global managed accounts provider to the asset and wealth management industry, today announced a strategic collaboration with LarrainVial to expand access to international managed account capabilities across Latin America, local wealth markets and U.S. Offshore channels.

The collaboration brings together LarrainVial's deep market presence, distribution capabilities and extensive relationships across Latin American wealth and asset management with inCadense's International Turnkey Asset Management Platform, iTAMP®, creating infrastructure to support the delivery of separately managed accounts (SMAs), unified managed accounts (UMAs), model portfolios and other fee-based investment solutions across currencies, custodians and jurisdictions.

Through iTAMP®, asset managers and wealth managers can use a common operating framework spanning portfolio construction, model and strategy delivery, account-level implementation, trading connectivity, multi-custody, multi-currency capabilities, rebalancing and reporting. The architecture is designed specifically for international wealth markets where investment products, currencies, custody arrangements and regulatory structures can vary significantly by client and jurisdiction.

The relationship is intended to help address an important infrastructure opportunity across Latin America: enabling wealth firms to move beyond predominantly transactional product distribution toward scalable, portfolio-based and fee-based advisory models while broadening access to global investment capabilities.

LarrainVial occupies a distinctive position in Latin American financial services, the firm has developed an integrated financial platform spanning third-party distribution, asset management, wealth management, brokerage and other financial services, with an extensive presence across Latin America and the U.S. Offshore market. LarrainVial has identified third-party distribution as a core strategic pillar and has continued to expand its multi-firm distribution model across the region and internationally.

"Latin America is moving toward a more global, advisory-led wealth management model, and that evolution requires infrastructure capable of supporting it," said **Andrés Bulnes**, Partner and Global Head of Distribution at **LarrainVial**. "inCadense brings an international managed account architecture designed for the realities of these markets – multiple custodians, currencies, investment structures and jurisdictions. We see a significant opportunity to work together to bring new capabilities to our clients and partners across Latin America and the Offshore market."

Bulnes continued, "Many of the next opportunities in Latin American wealth management are infrastructure challenges as much as they are investment-product challenges. Managers need a way to move strategies across borders. Wealth firms need scalable SMA and UMA capabilities.

Advisors need greater flexibility across currencies, custodians and investment structures. Bringing LarrainVial's market reach together with inCadense's international managed account infrastructure gives us an opportunity to address those needs and bring new solutions to the region."

The collaboration builds on LarrainVial's strategy of connecting investment managers and financial intermediaries with differentiated investment solutions. Its recent expansion in U.S. Offshore has emphasized scale, dedicated distribution resources and a multi-manager approach designed to deepen client relationships and broaden the range of investment capabilities available across the region.



AJ Harper, Managing Partner and Co-Founder of inCadense

"LarrainVial is a market leader in Latin America and has built one of the region's most impressive financial platforms, with capabilities spanning distribution, asset management and wealth management," said **A.J. Harper**, Managing Partner and Co-Founder of **inCadense**. "What stands out is their deep commitment to bringing new investment solutions to market and their ability to

reach clients across both local and offshore channels. We are extremely pleased to work with the LarrainVial team to expand the infrastructure supporting fee-based advice, managed accounts and global investment capabilities throughout the region."

inCadense's open-architecture model is designed to connect asset managers, wealth managers, custodians and execution providers within a unified managed account environment. The platform can support international securities and investment structures including UCITS, foreign ordinary shares, global fixed income, ETFs, mutual funds, separately managed accounts and, where appropriate, alternative and private-market investments.

The collaboration reflects both firms' view that Latin American and international wealth markets will increasingly require infrastructure capable of connecting global investment capabilities with local and offshore advisory relationships in a scalable, transparent and flexible format.

About LarrainVial

Founded in Chile in 1934, LarrainVial is a leading Latin American financial services firm with capabilities spanning asset management, wealth management, capital markets, brokerage and third-party investment distribution. The firm has built an extensive regional presence and has continued to expand its distribution capabilities across Latin America, the United States and the U.S. Offshore market. Third-party distribution represents a core pillar of LarrainVial's business and its strategy of connecting clients with differentiated global investment capabilities.

About inCadense

inCadense® provides technology and services that support asset and wealth managers in designing and delivering managed-account solutions for international investors. Its digital International Turnkey Asset Management Platform, iTAMP®, supports SMAs, UMAs and model portfolios through an integrated architecture spanning multiple custodians, currencies, asset classes and jurisdictions.

Through open architecture, global custody and execution connectivity and portfolio implementation capabilities, inCadense helps financial institutions expand managed-account offerings, reduce operational complexity and deliver institutional-quality investment capabilities across international and offshore wealth markets.