

Money Manager X-Change: Easier to Explore, Easier to Evaluate

Scaling investment management shouldn't mean sacrificing control, or your time. We built Money Manager X-Change (MMX) to give you efficient access to third-party money managers and institutional-grade strategies directly through Liberty, without the operational complexity. You choose the partners and approaches that fit your clients' needs. We handle the infrastructure behind the scenes.

Now, we're making MMX even easier to explore and evaluate. A **redesigned MMX Directory** is available now, and a **new Manager Insights Guide** is coming soon.

Why Advisors Rely on MMX

Keep everything in one ecosystem

Integrated with Liberty, MMX helps you spend less time switching between platforms and more time advising.

Scale with flexibility and control

MMX supports a scalable approach to investment management while giving you flexibility in how much investment management you delegate.

Deliver more tailored client solutions

Access to a broader range of investment approaches helps support different client goals, preferences, and portfolio needs.

What's New?



Redesigned MMX Directory

The redesigned MMX Directory makes available managers and strategies easier to review with a clearer structure and added strategy-level detail.

Strategy Category and Subcategory

For more detailed classification of available strategies

Investment Vehicle(s)

Including ETFs, Mutual Funds, Stocks, or a combination

Clearer organization

Money Managers are now grouped into two categories: Premier MMX Money Managers and MMX Money Managers

Model Number

For faster lookup and enrollment



Manager Insights Guide

COMING SOON

Evaluation is about to get deeper. Our new Manager Insights Guide will deliver added context on participating asset management firms and their strategies, including investment processes, risk profiles, and scoring methodologies. It's designed to help you assess options with greater confidence and get more value from MMX.

The Bigger Picture

According to Cerulli Associates, nearly 60% of independent advisors now rely on model portfolios or outsourced investment management to scale efficiently, and that adoption rate is accelerating.¹ Firms that leverage streamlined marketplaces like MMX typically expand their investment offering without expanding their research team, reclaiming time to deepen client relationships, pursue business development, and drive firm growth.

Take the Next Step

[Learn more about MMX](#)



Explore how MMX supports third-party investment management through Liberty.

[View the MMX Directory](#)



Access our list of model portfolios including money manager contact information and key strategy details.

Questions? If you are ready to get started with MMX, ask your Client Service Advocate for the MMX Client Advisor Guide.

¹Source: The Cerulli Report—U.S. Asset Allocation Model Portfolios: Model Customization and Tax Optimization, 2022.

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