An advisor starts with an inventory of hundreds of ETFs and mutual funds from a number of different fund families. She has a clear and defined process and can easily explain that to her client as well.

She then uses Team Builder to categorize all of those funds into asset class categories.

The funds in each of the asset class categories are then ranked according to the Dorsey Wright Fund Score. Ranging from 0-6, with 6 being the strongest, the Fund Score measures the market Relative Strength, peer Relative Strength, and trend of that particular ETF/mutual fund.

With that information and layout, our advisor is ready to select which of the funds from that initial broad inventory will ultimately make it into her client's portfolio.

She has a clear and defined process and can easily explain that to her client as well.