First Trust
Investment Solutions

Managed Account Solutions

First Trust Investment Solutions L.P. is a registered investment advisor headquartered in Naples, FL. We deliver streamlined managed account solutions to advisors and their clients, providing access to a variety of asset classes and innovative investment strategies in a single account. We offer the ability to customize a portfolio to each client's investment objectives as well as turn-key solutions — all researched and professionally managed by our highly skilled portfolio management teams. In September 2023, First Trust Investment Solutions L.P. acquired Gyroscope Capital Management Group, LLC, an investment adviser with more than 16 years of experience providing low volatility, equity income and custom hedging solutions for individuals and institutional investors.

Drawing from decades of experience and a forward-thinking mindset, First Trust Investment Solutions L.P. was founded with a clear objective to provide the following:

Expertise

Our team of portfolio managers and investment strategists has years of institutional investment experience. This expertise, combined with our advanced technology, allows us to stay attuned to investment trends and offer you optimal investment solutions.

Client-Centric Approach

Your success is the fundamental measure of ours. Every investor is unique, and we are committed to crafting thoughtful solutions, tailoring our strategies to match your preferences, risk tolerance, and financial goals.

Innovation

Innovation is ingrained in our DNA. We have an unwavering commitment to provide state-of-the-art investment solutions and actively explore emerging trends and breakthroughs to deliver tangible results for our clients.

First Trust at a Glance

First Trust Investment Solutions L.P. is an affiliate, through common ownership, of First Trust Portfolios L.P. and First Trust Advisors L.P., (collectively "First Trust"). First Trust was established in 1991 to cultivate relationships with financial professionals and help solve the needs of their clients. With a rich history spanning over 30 years, First Trust has earned a prominent reputation for its pioneering thought leadership and innovative solutions catering to diverse investment needs. First Trust and its affiliates provide access to an array of asset classes and strategies through separately managed accounts, alternatives, direct indexing, structured investments, unit investment trusts, exchange-traded funds, mutual funds, variable annuities, and closed-end funds.

What We Offer

Separately Managed Accounts (SMAs)

Gain exposure to the potential advantages of professional asset management through our Separately Managed Accounts. Our expert portfolio managers and comprehensive lineup of investment strategies allow customization and tax management to align with your financial goals, needs, and personal values.

Long Only Equity SMAs

First Trust SMID Cap Low Volatility
First Trust Large Cap Low Volatility

Tax-Advantaged Equity SMAs

First Trust Global Core
First Trust Large Cap Sector ETF

Premium Income SMAs

First Trust Large Cap Core Premium Income
First Trust Large Cap Value Premium Income
First Trust Large Cap Growth Premium Income
First Trust Large Cap Sector Momentum Premium Income

Target Income SMAs

FT Cboe Vest Large Cap Equity Target Income
FT Cboe Vest Large Cap Sector ETF Target Income

Customized Options Solutions

Our innovative options overlay solutions allow for easy implementation to both retail and institutional portfolios. We offer customizable strategies to enhance yield, manage risk, and tax-efficiently transition securities, including concentrated stock with a low basis.

Option Strategies

Hedging Strategies

- Covered Call Direct Indexing
- Protective Puts
- Collars
- Option Spreads
- Exchange-Fund Replication

Income Enhancement

- Covered Call Income
- Covered Call Transition
- Cash-Secured Put Write

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