



Gain the Advantage: Time

OUR SOLUTION LETS YOU SPEND MORE TIME WITH CLIENTS AND NOT SACRIFICE THE QUALITY OF YOUR SERVICES.



Independent investment advisors struggle to manage their time, as well as their client portfolios. That's why a software tool that automates those cumbersome tasks of rebalancing and account performance reporting truly gives you an edge. Now, how about one that also monitors portfolio asset allocation?

“Minuteman Advisor Services is a software platform.... that assists with each step of the asset management process?”

Minuteman Advisor Services is a software platform designed for the independent advisor who chooses ETF portfolios for their clients. This is a solution that assists with each step of the asset management process, from determining risk tolerance, to deploying a portfolio, to creating performance reports—even with outside accounts like annuities, providing clients a smooth and professional experience. Even better, this solution costs much less than you'd expect.

Please call for a personal online demo



- Software as a Service (SaaS)
- Access completely online
- Custom web site for clients
- Easy to use portfolio tools
- Fully automated
- 18 template portfolios
- Integrated custodian/broker
- Most trades just \$1 per ETF



Minuteman Advisor Services

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