



INTEGRATED

Advisors Network

Empowering Advisors with an Integrated Platform of Extraordinary Investment Capabilities and Unparalleled Operational Support



Personally Branded Practice

Facilitating brand differentiation and the complete ownership and control of assets for each advisor through:

- Providing the advantages of ownership without the headaches
- Solutions and services to suit any business model
- Marketing and legal documents branded to the advisors dba
- Independently branded Form ADV Part 2
- The advisor maintains complete control of client relationships



Transition Support

Total support for a smooth transition, providing limited interruption, including:

- Licensing & registration
- Dedicated transition consultant
- Training and education
- Support for data migration, pre-populated account transfer paperwork & related shipping costs
- Assistance with marketing, branding and client communications



Back Office Support

A powerful, scalable and cost-effective back office to ease operational burdens by providing:

- Administrative support
- Access to wealth management platforms, including third-party managers
- Client fee billing
- Customizable & consolidated reporting
- Trading support, advanced research and client management software



Full Compliance Support

Keep your practice safe without the burden of managing your own compliance program:

- Form ADV creation and ongoing maintenance
- Provision of legal documents
- Establishment, supervision and upkeep of appropriate and adequate compliance program
- Access to experienced CCO and compliance personnel
- Insurance services including cybersecurity

Integrated Advisors Network is a SEC-Registered Investment Adviser offering a “supported independence” business model to advisors who want to run their own business without bearing all of the cost and responsibilities associated with doing so. Through our strategic business alliances, we provide an integrated back office technology and services platform that allows advisors to establish their personally branded investment adviser practice, while leveraging the benefits of shared cost. We have created a unique and flexible environment that supports advisors during and after their transition to independence, and allows them to do what they do best: service their clients. **Find out more about how Integrated Advisors Network can help define your future.**

Elevating How Advisors Operate Their Business, Connect with Clients and Manage Their Accounts.

Powerful Relationships Through Strategic Alliances

Integrated Advisors Network provides a network of integrated solutions, pricing advantages, third party managers, research, consolidated reporting, and billing.



Turnkey Technology

Robust technology to help advisors get ahead of client expectations, delivering:

- Simplified, cloud based solution
- Electronic filing system
- Contact management system
- Financial planning software
- Portfolio management system
- Risk management software
- Video and teleconferencing
- Email retention and surveillance
- Secured data backed-up with antivirus software
- MS Office, Outlook, Citrix XenApp licenses
- Disaster recovery
- Dedicated IT support 24/7



Custody and Clearing Services

Custodial and Brokerage services provided to Integrated Advisors Network Advisors through strategic business partner relationships

- Leverage Integrated Advisors Network's preferred custodial pricing
- Access to industry leading proprietary technology
- Dedicated institutional trading desk
- Dedicated Implementation specialists and ongoing service team



Additional Services

Integrated Advisors Network is committed to supporting each advisor's lasting success

- Practice management
- Succession planning
- Customized marketing strategies
- Website design and management
- PR Consultation
- Broker/Dealer referral with fair pricing
- Assistance with talent acquisition and development
- Referral and lead generation programs
- Cross marketing opportunities for specialized products and services
- Established managers for white labeling
- Human resource solutions
- Preparation of investment policy statements and investment management agreements
- Business concierge services and more...

