

IPS Advisor Pro™
A product of fi360®

fi360®

NOT YOUR AVERAGE WEALTH MANAGEMENT TECHNOLOGY

Thinking outside the box, so you don't have to.

Our award-winning technology delivers customized, professional Investment Policy Statements with ease. IPS AdvisorPro® makes IPSs simple to create and efficient to use.

With an encrypted, secure web-based environment, you can create IPSs for eight different client types: individual/family, trust, endowment/foundation, charitable trust, profit sharing plan, pension plan, self directed 401(k) plan and life insurance.

**UPDATE ALL YOUR IPSs WITH ONE CLICK,
SOLVE YOUR COMPLIANCE REQUIREMENTS,
AND ENHANCE YOUR PROFITABILITY WITH
JUST ONE PRODUCT: IPS ADVISORPRO.**

We have looked for an IPS application for some time. IPS AdvisorPro provides a comprehensive, flexible and user friendly format that we have integrated into our advisory practice.

It's the right product at the right time. Also, the support staff is outstanding. Highly recommend the IPS AdvisorPro service.

*- Ed Bayarkski
Strategic Wealth Planning, Inc.*

Rarely does a product or service meet its advertised claims, and yours exceeds it, in my opinion.

*- Alan Campbell
Opis Companies*

Best practices include the use of an IPS. There are many programs out there that claim to produce one, but none targeted at the advisor market is as comprehensive as this one.

IPS AdvisorPro is not just comprehensive, it is well designed, highly customizable, easy to use, and fairly priced.

- Joel Bruckenstein, CFP®

TECHNOLOGY FEATURES

- Cloud based, available 24/7
- Fully customizable
 - words, fonts, colors can match your company branding
 - add, delete, modify any section
 - asset class descriptions
 - asset allocation models
- Multiple asset allocation models in a single IPS
- 8 unique IPSs, one for each client type:
 - individual/family
 - trust
 - 3 ERISA plans - self directed 401(k), pension, profit-sharing
 - foundation/endowment
 - charitable trusts
 - irrevocable life insurance trust (ILIT)
- New IPS user - suggestions are provided
- Experienced IPS user - customize your way
- Unique questionnaire for each client type
- Time saving features
 - update all previously created client IPSs in seconds
 - compliance control features for limiting changes by users

BENEFITS

- Create and update your IPSs more efficiently
- Customize your IPS around your firm's needs
- Make your IPS short or long
- Flexible format
- Differentiate yourself from the competition

PRICING

\$495/year for 100 new IPSs

www.fi360.com/ipsadvisorpro

(866)390-5080

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IPS AdvisorPro is a truly scalable tool for our firm. Being able to offer customized IPS for each client is helping us set ourselves apart from the competition.

The templates available and the "range" feature for the asset allocation help us communicate well with our clients.

- Derek Williams
Williams Wealth Management Group

As our company has grown, maintaining an updated Investment Policy Statement for each client had become a significant challenge.

However, IPS AdvisorPro has allowed us to easily maintain consistency in the documents we create while also making it easy to update existing Investment Policy Statements when such changes are needed.

- Jon Sullivan
Wealth Management Associates

