



Innovest IPS Advisor Pro

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, self directed 401 (k) plan and life insurance.

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)
- 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



ACQUIRE



INVEST



MANAGE



REPORT

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