



IPS AdvisorPro® Reaches 5th Anniversary

~ 5 year milestone marks rapid growth of innovative technology platform and industry adoption of Investment Policy Statements as the key tool to manage client relationships

Miami, FL – May 3, 2011. IPS AdvisorPro® just announced the 5th anniversary of the founding of the industry's leading web-based technology platform for creating, updating and managing Investment Policy Statements (IPS). From its origination in April 2006, IPS AdvisorPro® has experienced rapid growth and now serves over 1,400 financial professionals who have completed over 30,000 IPSs through the system.

“Over the past 5 years, we’ve experienced a tremendous amount of change and volatility in the financial markets,” said IPS AdvisorPro® co-founders Norm Boone, CFP® and Linda Lubitz Boone, CFP®. “But, the one thing that has remained constant are the clear benefits of using IPSs to create transparency in how advisors work with their clients and to create a document that clearly illustrates how the client’s assets will be managed.”

IPS AdvisorPro® is built on the industry’s latest technology, capturing the many benefits of providing a secure, online tool that advisors can access any time and anywhere they have an Internet connection. Powerful customization tools provide advisors the flexibility and functionality to tailor ‘global’ IPS templates to illustrate their process and philosophy, as well as address the unique circumstances of each client within their IPS. Additionally, if firms need to change or update their investment process or methodology, they can simply make those changes, and with one click, automatically update all previously created IPSs across the firm.

Not only are IPSs a critical client management tool in terms of setting expectations in how an investor’s money will be managed, but also as the industry approaches a mandated fiduciary standard of care, the use of IPSs will become even more important.

“In our own financial advisory practices, we’ve seen the benefits of using IPSs with our clients, not only in growing and managing our firms, but also from the powerful workflow efficiencies and compliance consistencies we gain from the technology platform,” said Lubitz Boone and Boone.

“Going forward, we are looking for additional ways to improve the IPS AdvisorPro® platform to make it even more useful to advisors, including identifying additional technology integration opportunities. We are very proud of our team of technologists and service professionals who have successfully helped us manage the growth of IPS AdvisorPro® and we look forward to a long future of partnering with the industry’s leading firms to help them provide professional, customized IPSs to their clients,” concluded Boone and Lubitz Boone.

IPS AdvisorPro® Timeline

April 2006	IPS AdvisorPro® becomes the first Web-based technology platform in the industry for creating, updating and managing IPSs
April 2006	<i>The Glowacki Group LLC</i> becomes first IPS AdvisorPro® user (still a current subscriber)
December 2006	<i>Morningstar's Technology Editor</i> names IPS AdvisorPro® "Best Software of the Year"
December 2006	1,000 th IPS created
October 2007	5,000 th IPS created
November 2007	Co-founders of IPS AdvisorPro® recognized as "Industry Innovators" by <i>Financial Advisor</i> magazine columnist Andy Gluck
March 2007	IPS AdvisorPro® becomes founding member of "Your Silver Bullet" technology integration consortium
April 2009	<i>CPA Wealth Provider</i> recognizes IPS AdvisorPro® as a "Financial Planning Awards Winner"
May 2009	20,000 th IPS created
June 2009	<i>MoneyGuidePro™</i> technology integration launched
August 2009	"Return on Investment" IPS AdvisorPro® white paper published, documents the thousands of dollars in savings by automating IPS process
August 2010	<i>Asset Allocation Range</i> platform enhancement creates flexibility to handle all investment styles and approaches
April 2011	<i>Redtail CRM</i> technology integration launched
April 2011	30,000 th IPS created
April 2011	IPS AdvisorPro® celebrates 5 th Anniversary

About IPS AdvisorPro®

Created by financial advisors for financial advisors, IPS AdvisorPro® is designed to work with all types of wealth management professionals and their practices. IPS AdvisorPro® offers a flexible solution to creating and managing Investment Policy Statements that are easy to use through an encrypted, secure web-based environment. With over 1,400 users and over 30,000 IPSs created, IPS AdvisorPro® is the industry's leading technology solution. IPS AdvisorPro® was named in 2006 by Morningstar's Technology Editor as the "Best Software of the Year" and was a CPA Wealth Provider "Financial Planning Awards Winner" in 2009. For more information, please visit

www.IPSAdvisorPro.com

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