



United Planners Selects IPS AdvisorPro® For Investment Planning Technology

~ Innovative Platform Will Provide United Planners Financial Services with Web-based Tools for Creating Investment Policy Statements

Miami, FL and Scottsdale, AZ– May 6, 2011. United Planners Financial Services announced today the selection of IPS AdvisorPro® to provide their sales force with advanced investment planning tools for developing Investment Policy Statements (IPS).

“In this era of financial services industry reform and a focus on a fiduciary standard of care, the use of IPSs have become critical for financial advisors to use with their clients,” said co-founders Norm Boone, CFP® and Linda Lubitz Boone, CFP®. “The IPS is rapidly being embraced by the industry as the go to document and record of the agreements between financial advisor and client about how their money will be invested to ensure compliance with new regulations and to protect the firm from liability exposure.”

As part of the arrangement, financial advisors affiliated with United Planners Financial Services will have access to preferred pricing, education and training on customizing and using comprehensive IPSs in their practice.

“We are constantly looking for ways to enhance our offering to our financial advisors and their clients. IPS AdvisorPro® is a great example of how innovative online technology provides effective solutions,” said Billy Oliverio, Vice President of Investment Advisory Services at United Planners Financial Services. “The IPS AdvisorPro® platform provides the ability to easily create, update, archive and produce IPSs in an efficient manner. The capability to provide customizable IPSs is one of several examples that position our financial advisors as true investment professionals with their clients. These are the types of strategic partnerships that truly bring value to our financial advisors and their clients.”

United Planners and IPS AdvisorPro® are unaffiliated companies.

About United Planners

United Planners is a full-service independent broker/dealer and registered investment advisor that is uniquely structured as a limited partnership that provides ownership opportunities to their financial advisors. United Planners was established in 1987 and is a nationwide firm that provides independence and flexibility that is supported by a strong back-office that is committed to technology, service, marketing, compliance, operations, insurance services and advisory services. United Planners has strategic relationships with various financial planning and open-architecture service providers in the retirement plan marketplace to provide their financial advisors the tools and resources to continue to build their business while adhering to high fiduciary standards. For additional information, visit United Planners' web site at www.joinunitedplanners.com. Member FINRA, SIPC

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 29,000 IPSs created, IPS AdvisorPro® is the industry's leading technology solution. IPS AdvisorPro® was named in 2006 by Morningstar as the "Software of the Year" and was a CPA Wealth Provider "Financial Planning Awards Winner" in 2009. For more information, please visit www.IPSAdvisorPro.com

For More Information, please contact:

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