



IPS AdvisorPro® Launches Intern Training Program

~ Innovative program will train interns at advisory firms to implement Investment Policy Statements as well as highlight ways to facilitate a successful internship

Miami, FL – June 13, 2011. IPS AdvisorPro® announced today a new training program designed to enhance the intern experience at financial advisory firms by providing them with a technology focus as well as sharing the best practices for what makes a successful internship. The IPS AdvisorPro® intern training program will provide training to interns to manage the Investment Policy Statement (IPS) process through the innovative IPS AdvisorPro® technology platform. Additionally, the training program will offer tips, ideas, best practices and strategies for designing a meaningful experience that will position interns for a future career in the wealth management industry.

“In our experience as managing principals of growing advisory firms, we’ve worked with dozens of interns over the years and have identified what makes a successful internship program for both the student and the sponsoring firm,” said IPS AdvisorPro® co-founders Norm Boone, CFP® and Linda Lubitz Boone, CFP®. “Interns tend to be technology savvy and are eager to have a project that they can call their own and contribute to the organization in a meaningful way. This program will provide the IPS and technology training to do that while also providing key insights on ways to maximize their time at their firms.”

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 their IPSs to their client’s individual situation. 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 IPSs across the firm.

The IPS AdvisorPro® Intern Training Program will consist of online training, webcasts and feature the advice of Linda Lubitz Boone, CFP®, and President of The Lubitz Financial Group, OR, Norm Boone, CFP®, and President of Mosaic Financial Partners, on how interns can make the most of their time with their firms, work effectively in their roles and learn all aspects of what a career in the financial services industry entails.

“Many advisory firms have a strong appetite for bringing on interns to help them in their business, yet struggle for what types of tasks and duties to assign them,” said Lubitz Boone and Boone. “We believe that the IPS AdvisorPro® Intern Training Program will

be a model for the industry and we look forward to working with the next generation of financial advisors.”

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 31,000 IPSs created, IPS AdvisorPro® is the industry’s leading technology solution. IPS AdvisorPro® was named in 2006 by Morningstar’ Technology Editor 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.

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