



## SKADVISORS, LLC.

*Using Interactive Advisory Software (IAS) to Meet the Demands of High Net-Worth Clients*

*“IAS has helped a small firm like SKadvisors meet the large demands of the high net-worth market.”*

**- J. Roger Shealy, Managing Member (Chief Economist), SKadvisors, LLC.**

### **The Company**

Since 2004, SKadvisors, LLC., ([www.skadvisors.com](http://www.skadvisors.com)) located in Titusville, Florida, is an independent investment advisory firm, marketing its services to high net-worth individuals. The firm’s goal has always been to build a family practice, which services the investment and financial needs of its clients.

### **The Challenge**

SKadvisors, LLC. is independent in every sense of the word. The firm did not want to rely on proprietary products it felt pressured by its various custodians to use. More importantly, SKadvisors required a solution, which could interface with various custodians. Since it is a small operation, which consists of personnel who all take on multiple responsibilities, SKadvisors also needed a solution that could help reduce time, make it possible to maintain a virtual office anywhere, and transform the firm into a completely paperless one.

### **The Solution**

SKadvisors looked at other products and knew they were simply not right for the firm’s needs because they could not do what could IAS could.

From its inception, SKadvisors, LLC., has used IAS, the Web-based solution, which is cohesive enough to incorporate financial planning, portfolio management, and customer relationship management. “IAS is truly an all-in-one application for independent investment advisors”, said J. Roger Shealy. Because it is all-in-one, SKadvisors has noticed improved manageability of clients’ portfolios and financial activities.

For SKadvisors, LLC., IAS’ unified solution has also surpassed its competition and separated itself from other products with its ability to seamlessly interface with numerous custodians,

increasing the firm’s access to available products.

### **The Results**

Although IAS cannot claim sole credit for SKadvisors, LLC.’s success, it can claim that it enabled the business resources at SKadvisors to enhance its abilities to produce some incredible results.

Results and benefits regarding the client portal include:

- IAS makes it appear as though SKadvisors is offering all of the vital information online to clients through seamlessly allowing clients to visit the portal from SKadvisors’ own company Web site, which they can log on from anywhere and it provides the ability to view their entire portfolio in a variety of formats – value, allocation, and individual securities.
- Through the client portal, SKadvisors has the ability to formally communicate through reports and correspondence.
- In a competitive environment, the ability to keep clients up-to-date with current portfolio pricing through the client portal has been a huge advantage.

Other results include:

- Because IAS makes a virtual office possible, SKadvisors has been able to not only save time but also resources necessary for overhead, as well.
- SKadvisors desired a product that could interface with other custodians so it could reduce the risk of being tied to a single custodian and be able to offer clients a greater selection, and that is exactly what IAS has offered to the firm.
- Since IAS is designed from the advisor to the custodian rather than from the custodian to the advisor, the specific needs of reporting on client assets in an aggregate form, regardless of where the assets are held, are met.

**Looking for a solution to provide your firm with similar results? Call 1-800-821-7355 or visit [www.iassoftware.com](http://www.iassoftware.com) for more information.**