



## SUMMIT WEALTH MANAGEMENT

*Using Interactive Advisory Software (IAS) to Seamlessly Manage Multiple Locations*

*“IAS makes it possible for our multi-location firm to work in a fluid manner regardless of distance.”*

**- Angelo Alleca, Owner of Summit Wealth Management**

### **The Company**

Summit Wealth Management is a fee-only RIA. Its growth is contingent upon acquisitions, and its target market is wealth management clients with the average net worth of between \$1 million to \$5 million. Within the next three years, Summit Wealth Management plans to reach \$2 billion in assets.

### **The Challenge**

A few years ago, Summit Wealth Management wanted to increase its acquisitions and it was very important all locations be on the same platform for several reasons but most importantly, the compliance aspect.

### **The Solution**

Summit Wealth Management evaluated the top companies and their CRM, financial planning, and portfolio management software but it was IAS' unified solution – an all all-in-one solutions package - and competitive product offerings, which truly stood out from the rest.

In addition, David and Linda Grace definitely made IAS the most distinctive from other companies. David Grace, Ph.D., started IFS in 1981, which is the company that provided the first fully integrated software solution for the independent financial advisor and Linda Grace also played a significant role on IFS' management team. Both are now on the executive management team of Interactive Advisory Software (IAS). Summit Wealth Management finds that having the entire executive management team so accessible is not only what separates IAS from the rest, but just knowing the founders are such an integral part in the process really brings Summit Wealth Management a true sense of reassurance no matter how many locations it acquires.

Summit Wealth Management chose IAS as the consistent technology model for all of its firms, regardless of location, and completed its conversion with IAS, the truly unified, Web-based solution, in 2004.

Summit Wealth Management may not be the largest organization but it has endless aspirations and with IAS' help, it will hopefully be able to bring those aspirations into reality, having already expanded from only three locations to nine within the past few years.

### **The Results**

Although IAS cannot claim sole credit for Summit Wealth Management's success thus far, it can claim that it enabled the business resources at Summit Wealth Management to enhance its abilities to produce some incredible results.

Some of those results include:

- In the past three years, Summit Wealth Management has grown from a firm with three locations in various regions of the United States to a firm with nine locations.
- All locations acquired by Summit Wealth Management are on the same platform, which means the company can integrate all three aspects of its business and every location can be easily monitored.
- The ease of having multiple office locations on the same platform makes acquiring additional locations much simpler.
- No matter how many locations are acquired across the U.S., all can be centralized through IAS without having to actually do so physically.
- Time and money saved through streamlined data entry, updating, and review, as well as custom reports, such as client review reports.

**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.**