CUSTOMER RELATIONSHIP MANAGEMENT (CRM): Leading Practice Management

ias
Interactive Advisory Software

Practice Intelligence

- View Comprehensive Client Information
- Synchronize IAS with Microsoft Outlook
- View Customizable Lists for Quick Analysis
- Enable Best Practices for Improving Firm Results
- Print or Export Customizable Lists for Detailed Analysis
- Manage and Share Client Documents and Presentations Securely
- Create Secure and Personalized Site for Client and Advisor Access
- Prepare Client Invoices Using Highly-Flexible, Integrated Billing
- Integrate Practice with Planning and Portfolio Seamlessly
- Generate Client Presentations "as of" any Date or Period
- Send, Receive, and Track E-mail for Clients and Contacts
- Share and Assign Appointments and Tasks

Client and Advisor Access

- View Up-To-Date Financial Summary and Cash Flows
- Provide Internet Access to Client Data and Presentations
- Access Electronic Documents and Presentations Securely
- View Up-To-Date Values for all Downloaded Accounts and Positions
- Utilize Financial Calculators Linked to Planning Goals
- Modify Existing Client Lists and Screen Layout

Practice Management

- Maintain a 360° View of Each Client and Household
- Integrate Calendar with Client Assets and Insurance Data
- E-mail Interface to End-User Mail Service (Exchange/POP)
- Create Personal Contacts List (Non-Client)
- Create Advisor Contacts List (Non-Client)
- Assign and Notify Tasks to Clients, Staff, and Advisors
- Create Appointments and Associate With Clients or Advisors
- Set Alerts and Alarms for Virtually Any Situation
- Create Encounters for Every Type of Client Contact
- Combine Separate Clients Into One Household
- Split Client Assets Into Separate Households
- Create Notices/Reminders for Virtually Any Situation
- Share Client Information Between Advisors
- Create Lists for Upcoming Important Events (birthdays, anniversaries)
- Setup Clients as Household/Company/Affinity Group
- Create Unlimited Number of Households
- Change Prospect to Active Client Effortlessly
- Create Unlimited Number of Household Members
- Manage RMD Distributions with Comparison Views
- Manage Client Contributions to Qualified Plans and Other Savings
- Transfer Clients From One Advisor to the Next
- Create Unlimited Number of Notes
- Create Special Codes for Client Segments/Profiles
- Monitor Date-Sensitive Issues at Any Interval
- Notify Individual or Group Instantly of Target Situation

Compliance Support

- Create Client Holdings Reports
- Manage Advisors Through Tiered Reporting
- Classify Accounts/Assets by Trading Discretion
- Maintain Compliance with Secure Document Storage
- Review Management Fees Based on Trading Discretion
- Create Trade Blotters (Based on Relationship to Firm)
- Create Product Cross Index (Sorted by Any Product)

Additional Benefits

- Support Prospects and Clients of All Types
- Integrate with Microsoft Office Suite Applications
- Enter Unlimited Contact Information for Each Household
- Create Mass Mailings Through Custom Mail Merge Documents
- Manage and Automate Office Workflow and Business Processes
- Attach Documents/Presentations to Client Records for Easy Retrieval
- Interface to Scanning Software to Attach Documents to Client Records
- Create and Maintain Recurring Tasks and Appointments
- Track Client Holdings by Account/Asset Class/Category
- Create and Manage Marketing Campaigns Effectively
- Create Appointments for Groups of Advisors/Staff

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