

# CLIENT ACCESS PORTAL

Increasing Your Ability to Better Serve Your Clients



## Key Benefits:

- Increase customer service by providing instant secure access via the web to your clients
- Gain competitive edge over your competition with online service offerings
- Create new revenue opportunities

## Key Features:

- Branded website
- Content tailored for each of your clients
- Complete control

## Portlet Options:

- View Assets by Account, Financial Goal or in Aggregate
- Asset Class Distribution Graph
- Key Client Advisors
- Document Safe
- Client File Up Load
- Client File Download
- Market Indexes
- Client Profile
- Financial Calculators
- Unrealized Gain/Loss Values
- Client Task Assignments
- Other Special Portlets

Our Client Portal allows you to provide additional services to your clients, giving them a “window” on the web into their own data, including selected reports, financial calculators and up-to-date financial statements. This two-way communication enhances your client management services, keeping clients informed and reducing your workload.

## Net Benefit With Minimal Cost To Deploy

Unlike many portal projects that require significant time and cost to develop, the IAS Client Portal is as simple as turning on a light switch for your clients. Over the years, clients have become more and more demanding of self-service tools. Clients continue to ask for easier ways to stay informed and they need better ways to collaborate with their financial advisors. A client portal can not only meet your client’s thirst for information, but also can be an effective marketing tool when attracting new clients.

## Increase Client Loyalty

The IAS Client Portal allows your firm to deepen your relationships with your clients, expand your corporate footprint and service offerings and increase your brand awareness with your clients and partner advisors. Wealthy and technology savvy customers are not only looking for advisors who are capable of delivering traditional wealth management services, but also advisors who can deliver market leading tools.

## Provide Access for Client’s Key Professionals

The IAS Client Portal allows your client to include their other key advisors such as attorneys, accountants and other professionals, allowing access to strategic data relevant to your client’s needs.

## Promote Your Firm for Increased Revenue

The client portal offers your firm the opportunity to target promotions for increased revenue opportunities. The personalization and communication capabilities of the IAS Client Portal can enable cross-selling and up-selling opportunities. Firms can also consider making on-line access a fee-based option to their select clients.

## Attract and Keep High Net Worth Clients

IAS affords your firm, whether large or small, the ability to offer your clients and advisors web-based services including: internet portals, online questionnaires, reports and access to critical information pertaining to investments. Selecting IAS Client Portal ensures that you are utilizing the best software to increase your firm’s overall client satisfaction and continuing to grow a strong revenue base of profitable clients.

## About IAS

Interactive Advisory Software is the first company to offer a fully unified, browser-based technology solution containing comprehensive financial planning, portfolio management, and client management software all in one unique package. From sales to support, IAS is focused on increasing your satisfaction and providing software solutions that help you achieve your firm’s goals.



Rich, personalized client portal that contains information such as assets, calculators, news, links, and account balances.