



BPAS Partner Solutions

Services to optimize, enhance, diversify, and scale your business

BPAS Partner Solutions help advisors expand their wealth management capabilities and grow their business. Offered in conjunction with our sister organizations, our partner support services are designed to complement your business and enhance your client deliverables.

Solutions

- **Outsourced Chief Investment Officer:** Our highly-credentialed team delivers a range of investment strategies to help meet your client's unique goals. We take care of the investment details — portfolio research, construction, and monitoring — so you can focus on growing your business.
- **Outsourced Trust Services:** Leveraging our national trust charter and OCC-examined professionals, we integrate with your team to handle the full range of trust, administration, and custodial services. Respond to your clients' continuum of trust and life planning needs with solutions designed to help preserve wealth and minimize tax exposure.
- **Express IRA:** Our low-cost, technology-driven IRA program makes it easy to sell and support small to mid-sized IRA accounts within your institution. Accounts are easy to open with e-signature technology. Clients have robust 24/7 web access. And the program comes with our professionally managed investment menu and range of risk-based portfolios. We take care of the day-to-day operations and heavy lifting, so you can consult with clients and use your time efficiently.
- **Financial Planning:** As an extension of your practice, our seasoned financial professionals can offer fully integrated financial planning services. We can provide your clients with a complete overview of their financial condition and offer financial independence planning, investment and tax planning, liability management, estate and Medicaid planning, and business succession planning. Augmented by our team, you can provide a full scope of services for your clients.

Benefits

- **Boost** value to your clients with new or expanded services
- **Drive** new revenue opportunities while avoiding the overhead costs of hiring in-house
- **Partner** with highly experienced, credentialed, and accessible professionals
- **Reduce risk** and liability with a partner's expertise
- **Customize** a partnership that best complements your practice

Get in touch and start growing your practice today. **Let's talk.**

☎ 1.866.401.5272 ✉ TrustSales@bpas.com 💻 bpas.com

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