



intelliflo Advisers Inc. • 1555 Peachtree St NW STE 1800, Atlanta, GA 30309  
[www.intelliflo.com/us/our-solutions/intelliflo-managed](http://www.intelliflo.com/us/our-solutions/intelliflo-managed)



## INTELLIFLO ADVISERS INC. Bryan Perryman CEO

No two RIAs are the same and we enjoy working with our partners to find the right solution to their needs. We believe in successful and productive relationships in which we are fully aligned with your business to achieve your goals.

Sometimes smaller RIAs can be ignored and neglected by larger TAMPs. We hear a lot of dissatisfaction concerning cost and service levels. Our service levels and our approach to investing and partnering with our customers for long-term success is one of our biggest strengths.

Given market growth against the broader backdrop of outsourcing, we're speaking to more firms who want to reduce cost and distractions of non-client facing activities. Further, they are finding it increasingly difficult to attract quality employees, and the cost to train and keep these employees is growing.

At **intelliflo Advisers Inc.** we are dedicated to partnering with you and understanding your unique needs so you can achieve your goals. We have over a decade of experience working closely with RIAs and see ourselves as an extension of your team by providing innovative, efficient and cost-effective solutions.

We understand that entrepreneurial RIAs face the challenge of balancing business management and growth with maintaining a focus on what you got into this business in the first place – your clients. Through collaboration with our sister company, intelliflo, we help accelerate your growth with solutions including robust investment management capabilities.

Balancing these needs is a real challenge. Here's how we help you succeed:

- **White-glove service** – We have a dedicated support team to help you solve challenges and grow your business. We're part of your team, not just another service provider.

- **Reduce the resources needed to run your business** – We handle those lower-value middle and back-office functions. You spend more time on the client-facing activities that matter most.
- **Deep expertise** – Our teams average 10+ years of experience supporting advisors like you and can help you navigate the many complexities of running your business.
- **Robust capabilities** – Our range of features and functionality, including model portfolios, tax capabilities, client experience tools and more, helps you stand out in a crowded market and continuously exceed client expectations.
- **Cost & efficiency** – Our platform is a more efficient and less costly solution than hiring more people or buying and learning more technology.

### New business contact:

Phone: 1-800-970-9080

Email: [sales@intelliflo.com](mailto:sales@intelliflo.com)

**Brand of program:** intelliflo managed

**Type of program:** Advisor Constructed Models, Advisor-Directed ETF, ETF, Managed Account Solutions, Model Manager, Mutual Portfolios, Open Architecture, Rep as Portfolio Manager, Risk Managed Portfolios, SMA, Strategist, TAMP, Third-Party Sub Advisors

**Total assets in program:** \$260 million as of 12/31/21

**Year program began:** 2008

**Managers on platform vetted:** Yes

**Managers GIPS® compliant:** Yes

**Type of products available:** ESG, ETF & MF SMAs, Custodial Mutual Funds, ETFs, Model based Account Managers, Multi-manager strategists, ETF Models, Model-only SMAs, Asset Manager, Asset Allocation Models,

Completion Strategies, Customizable Portfolios, Socially Responsible Investing, Tax Harvesting

**Program uses platform to track reporting of client holdings:** Yes

**Program is compatible for:** Multiple advisory channels including RIAs, Corporate RIAs, IARs, IBDs, Bank BDs and Insurance

**Program optimizes for tax and trading efficiency:** Yes

**Sleeve-level reporting:** No

**Program links to a trade execution or order management system:** Yes

**Program links to a trust accounting system:** No

**Private branding or white labeling possible:** Yes

**Proposal generator:** Yes

**Generates investment policy statement:** Yes

**Asset allocation methodologies:** Reporting on asset allocation is by asset class, region, or by sub-asset class