

Build A Proprietary Fee-Based Platform It's Easier Than You Think

Many small and mid-sized firms have historically believed that fee-based investment platforms were too complex and expensive to build internally. These firms have generally entered into the business by purchasing a platform from a third party, but have often not experienced the desired growth or acceptance of the fee-based business. Too often, their advisors have perceived these programs as too expensive, considered the use of an unaffiliated program unappealing and felt that the flexibility of the product offering was limited. Inadequate training support has often been an issue as well.

But it is possible to offer a fee-based platform that will deliver results, increase advisor acceptance and offer the sought-after flexibility you need. You **CAN** build a firm brand without the expenditure needed to develop the infrastructure exclusively with internal resources. You **CAN** be a market leader and significantly increase your fee-based assets.

We offer an open architecture approach to the process that offers the best of both worlds – the flexibility afforded by your own custom-designed fee-based platform coupled with the choice of products desired by clients and advisors – all in a cost-effective private labeled package.

Our Principals will work closely with you during the process, and we will help you decide whether to buy, build or outsource each component of **YOUR** program. Choose our end-to-end solution or opt for only the ala carte services you desire. Regardless, the end result is a custom platform that best fits your business and addresses all of the necessary elements - strategy, structure, operations, training, research, reporting and more – of a successful fee-based platform.

Proprietary – Build your own brand

Flexible – Designed for your unique needs

Efficient – Resource and time efficient

Saleable – Increased advisor acceptance and training

Sustainable – Develop a long term partnership



AKADVISORY PARTNERS LLC
Unlocking Real Value

RDKStrategies

Institutional Investment Solutions

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Strategy and Design

We begin with a strategic review of your business and goals, developing a business plan that meets your needs as well as those of your advisors and clients. We focus on making the client experience as user-friendly and cost-effective as possible.

Platform Development

Next, we develop the necessary paperwork, compliance procedures, and operating infrastructure. We help you address the five components of fee-based operations – new accounts, reconciliation, trading, billing and performance reporting.

Support

Finally, we provide on-going support. You can elect to take over the process yourself or have us continue to assist you with as you grow your fee-based programs.

Your Fee Based Platform

Research

We help you develop the appropriate research process to identify the investment options you want to offer and then help monitor them moving forward.

Marketing, Rollout and Training

We assist you in creating marketing materials and a launch plan for your new platform. We can also create a proprietary training program that assures that your advisors are well-trained.

Our mission is to be your long-term partner and assure that your program is successful from launch onward.



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