



*THE* INVESTMENT  
ADVISOR  
ALLIANCE

For Immediate Release

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## **IAA Completes Roll-out of Portfolio Reporting Software for Advisors**

**Ramsey, NJ (July 22, 2010)** – Comprehensive Portfolio Reporting is now available to all advisors and will soon be available to clients to view up-to-date consolidated activity for their household.

Investment Advisory firms are increasingly providing performance reporting to their clients at a great expense. The Investment Advisor Alliance, with its outsourced partner, offers advisors a fully administered, consolidated portfolio reporting solution. Data can be pulled from multiple custodians into a single report. On the horizon is the integration of aggregated data.

Bringing aggregated data to the reporting system makes the advisor a fully encompassing trusted professional. Additionally, it provides insight to assets held away and permits the advisor to provide advice, and accordingly bill, on accounts that otherwise were inaccessible to them or, at best, troublesome to access.

Advisors have two standard consolidated reports to choose from depending on the detail they would like to present. Optionally, the reports can be branded with the advisor's logo and color scheme to bring continuity to the presentation with their other materials.

### **About the Investment Advisor Alliance**

The Investment Advisor Alliance is a privately held Registered Investment Advisor based in northern New Jersey. The fee-only firm provides supervised independence to advisors nationwide utilizing multiple custodians and hybrid options for dually registered advisors. The Investment Advisor Alliance offers training, service, back office support, and compliance oversight to affiliates at any chapter of their career to help advisors grow their practice at their pace. Custom technology solutions make the Investment Advisor Alliance's tools easily accessible and efficient.