



## **Custodian and Hybrid Option Fact Sheet**

As an Open Access firm, The Investment Advisor Alliance has the capabilities to supervise and support your business regardless of your chosen custodian. Depending on your needs and asset level you may use:

Fidelity Institutional	Trade PMR
TD Ameritrade Institutional	Schwab Advisor Services
Shareholders Service Group	Scottrade Advisor Services
FolioFN Institutional	Trust Company of America

For advisors who would like to conduct both advisory and sales business, the following brokerages may be able to assist based on your production and custodian choice:

PKS Investments	Sterne, Agee, Leach Financial
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The Investment Advisor Alliance is not affiliated with any of the above firms. Our goal is to facilitate your business needs.

To learn more call us at 800-607-3340.