



AdvisorAdit is pleased to be an Institutional Member of FPA and Proud Sponsor of the 2012 Chapter Leaders Conference!

Who We Are

AdvisorAdit exists to serve the independent advisor community. We bring advisors and providers together through an exclusive, confidential channel where advisors can harness valued provider information and curate it, along with their own content, to help build sustainable relationships with their clients.

AdvisorAdit Key Features

Always On Your Terms

Advisors decide which providers are aggregated to bring value to their practice coupled with the freedom to seamlessly discover others. Further, with AdvisorAdit's robust Privacy Policy advisors have full visibility and control on Advisor - related information

Anywhere, Anytime, Any Leading Device

We think information delivered when it is actually needed is far more powerful than pushed content. Unlike email and other content distribution methods, AdvisorAdit strives to make provider content truly on-demand. With our Cloud-based application advisors can access provider as well as their own content anywhere, on any leading device.

Confidential Archiving

We believe that advisory practices are better able to grow when all members share a common base of information. With an AdvisorAdit firm subscription, all associates can access and collaborate on important content - including their own. Users can view, store, tag and comment on all pieces posted to AdvisorAdit.

What's In It For You?

AdvisorAdit will be launching early 2013. Working closely with the FPA leadership, we are pleased to offer FPA members a 50% discount to our annual baseline firm subscription fee of \$500/firm or \$249.95, and, a 35% discount to our Individual annual membership plan of \$275 or \$179.95^{1,2}.

Visit us at AdvisorAdit.com or contact us at Info@AdvisorAdit.com

The Fine Print

1. Baseline services for firms include access up to 20 persons and 2GB of dedicated storage. Additional seats and storage are available for an additional fee.
2. "Firms" are either legally recognized groups of individuals consisting of either a Registered Investment Advisor (Nationally or state registered) or a team of retail client-facing advisors that is distinctly branded from a broker/dealer, bank or wirehouse.
3. Individual user plans are available at a lower cost than firm plans with 1GB of dedicated storage. Additional storage is available for an additional fee.
4. All users must agree to AdvisorAdit Terms and Conditions in order to use the site.
5. No more than one discount plan is available per annual membership (Firm or Individual Plans).
6. Future fees and policies may change without notice.