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VSR Financial Services, Inc. has partnered with IPS AdvisorPro® to provide VSR financial advisors with advanced investment planning tools for developing Investment Policy Statements (IPS).

“The use of IPSs has become more than just a “best practice” in the industry,” according to IPS AdvisorPro® co-founders Norm Boone, MBA, CFP® and Linda Lubitz-Boone, CFP®. “In today’s environment, disclosure and transparency are becoming increasingly important and the IPS becomes the go to document and record of the agreements between advisor and client about how their money will be invested.”

As part of the arrangement, financial advisors affiliated with VSR will have access to preferred pricing, education and training on customizing and using comprehensive IPSs in their practice.

“We’re very excited to be able to enhance our offering to our financial advisors and their clients through the online technology of IPS AdvisorPro®,” said Chatten Scruggs, SVP Technology, of VSR Financial Services, Inc. “We take a long term, thoughtful approach to providing financial services and the use of IPSs is a critical aspect of that delivery. We look forward to streamlining that process and making it an easy step for our advisors through IPS AdvisorPro®.”

About IPS AdvisorPro®

Created by financial advisors for financial advisors, IPS AdvisorPro® is designed to work with all types of wealth management professionals and their practices.

IPS AdvisorPro® offers a flexible solution to creating and managing Investment Policy Statements that are easy to use through an encrypted, secure web-based environment. With over 1,000 users and 17,000 IPSs created, IPS AdvisorPro® is the industry’s leading technology solution.

IPS AdvisorPro® was named in 2006 by Morningstar as the “Software of the Year” and was a CPA Wealth Provider “Financial Planning Awards Winner” in 2009.