



Independent Wealth Network

Mission

We empower advisors to provide the best financial guidance, management, and services to their clients by using innovative technology, resources, and support.

Key Staff

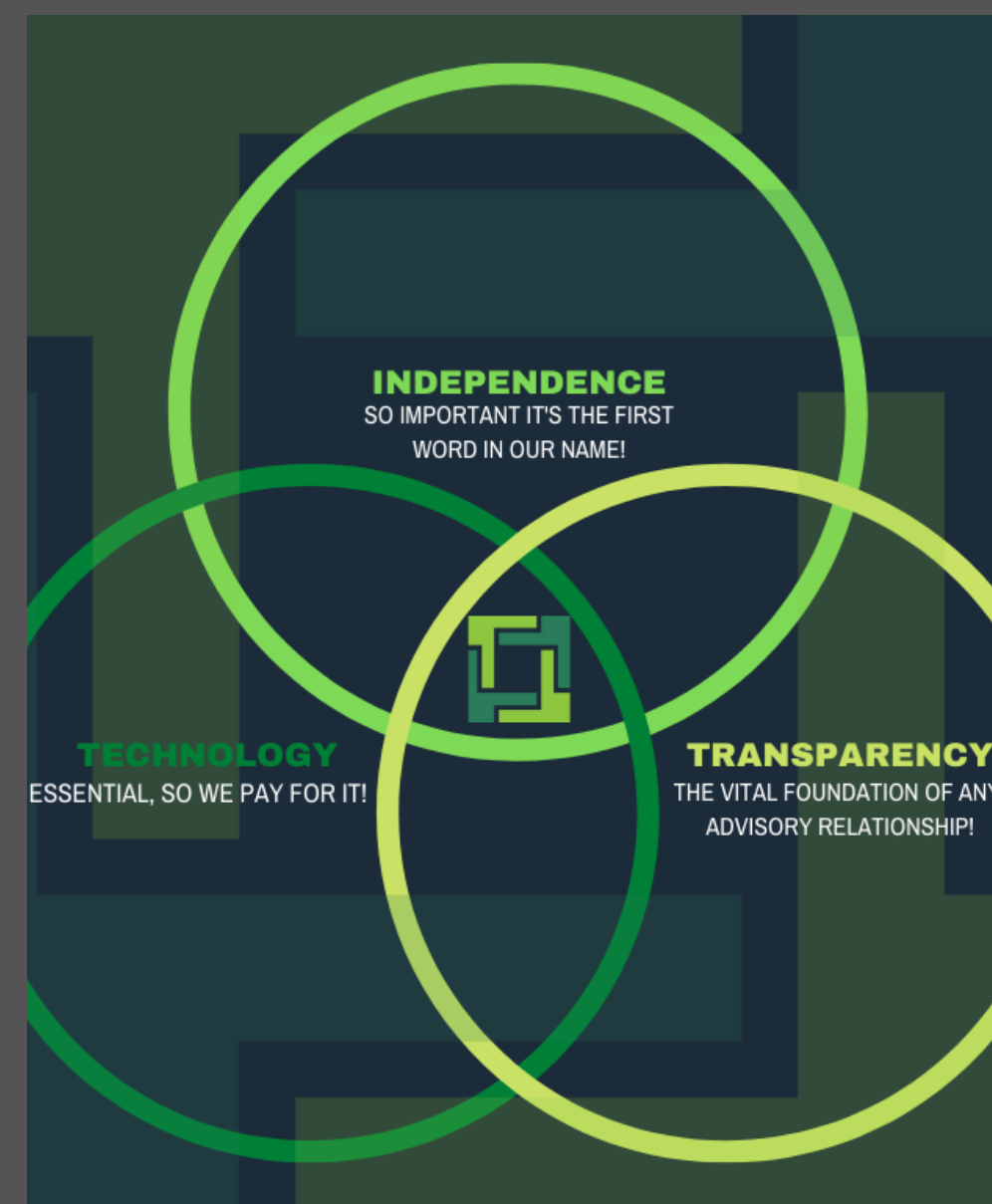
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Philosophy

Independence and transparency are the cornerstones for advisors to be fiduciaries and advocates for their clients. Eliminating obligations to any particular products, services, or providers creates the freedom required for principled ethics. Without sacrificing independence, advisors can communicate as a network. When faced with an issue requiring specialized knowledge or expertise, an experienced peer becomes a valuable asset.



REDTAIL

Web-based, full-featured and easy-to-use client management solution

ORION

Integrated performance reporting, accounting/billing, data management



SHAREFILE

Secure content collaboration, file sharing, sync and cloud-based storage solution

RISKALYZE

Pinpoint an investor's Risk Number and build portfolio that contains right amount of risk



TD AMERITRADE

Portfolio rebalancing technology for accounts held with TD Ameritrade Institutional—seamlessly integrated into Veo®, an account management and trading platform.

Y CHARTS

Comprehensive investment research platform designed to help advisors make smarter investment decisions



Advisory Programs

TD Ameritrade and SEI custody over 90% of our assets. TDAI is the discretionary platform; SEI for third party managers. At TDAI you have the option of building and managing your own portfolios, employing the IWN models, and you have access to the TD Ameritrade Model Market Center