INVESTORS CAPITAL

A premier independent broker/dealer

Get Cost-Competitive, Personalized, Value-Added Advisory Solutions

Get big firm advisory expertise personalized to your individual needs and customized solutions for a positive advisor/client experience.

At Investors Capital Advisory (ICA), we have had great success in developing and growing the advisory business of the firm as well as the individual advisory practices of our advisors because we focus on and understand your needs.

You get big firm expertise and advisory solutions that are personalized to accommodate your individual needs and customized for a positive advisor/client experience.

We achieve this by providing you with personalized Advisory solutions, a competitive cost structure, and the resources and tools for you to build a better, more valuable advisory business.

Flexible

Based on a true independent spirit, we understand that every advisor's practice is different and unique. Our advisory programs are, therefore, created to maximize flexibility, offering the most appropriate client experience for your business model.

We offer a full suite of Advisory options ranging from Advisor-As-Portfolio Manager, to SMAs, TAMPs, mutual fund wrap programs and full consulting relationships.

Our in-house managed account mutual fund wrap program (F-MAP) leverages the extensive experience and knowledge of our Investment Policy Committee to actively manage specific mutual fund portfolios along with the investment advisor.

Specifically, in our Advisor-As-Manager offerings, you have the ability to determine which fees associated with our programs flow through to the client and which ones are absorbed by your office. This flexibility allows for a customized experience. With the development of CapitalCONNECT, our suite of technological tools, personalized performance reports can be created for any of your client's needs.

Cost–Competitive

Investors Capital Advisory understands that in the competitive financial services world, cost control is crucial in order to win business and have capital left over to invest in your practice. With the creation of our A-MAP FT and FundSelect platforms, you, the IAR, take the entire asset management fee to the grid. In addition, with the Pershing sponsored Fundvest NTF Mutual Fund program, you have access to some great investment managers from a very competitive cost standpoint.

Practice Management Resources

By partnering with investment management, custodial, and technology leaders in the industry, Investors Capital continuously looks for ways to help maximize your efforts in the field and at the office. We believe in a consultative, one-on-one approach to implementing best practice compliance, trading, marketing and reporting solutions that will enhance and grow your Advisory practice.

Learn More About Our Advisory Programs

If you're looking for personalized Advisory solutions that are cost competitive for you and your clients, and the resources to build a better, more valuable business, contact Investors Capital.

CONTACT: Peter Acciavatti, Director of Branch Development
pacciavatti@investorscapital.com | 781 477-4768 | investorscapital.com