



Minuteman Advisor Services

Software for the independent RIA



stand-alone **SOFTWARE**

MAS Rebalancing

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software at work for you

MINUTEMAN STAND-ALONE SOFTWARE PROGRAMS

As an investment advisor, you need to periodically rebalance your client portfolios, but often postpone the task. So where do you find the time, when you'd rather give clients your attention? Advisors shouldn't have to juggle valuable "face time" with "back office time" to provide the high level of service today's investor demands. Minuteman Advisor Services stand-alone programs may be your ideal solution.

simple solutions for complex needs

PORTFOLIO REBALANCING

MAS offers its portfolio monitoring and rebalancing system as a stand-alone. Using this online program, you build your model portfolios, set the asset class tolerances and then let Minuteman alert you when an asset class strays so far that a rebalancing action is required. Advanced integration with your current broker/custodian is available for an additional setup fee.

KEY FEATURES:

- Simple interface means a short learning curve
- Semi-automated; you execute the required trades
- Works with any custodian or brokerage firm
- With advanced integration, upload client positions and receive rebalance alerts with trade instruction spreadsheet by email
- Client accounts 'pegged' to a model portfolio: adjust tolerances, asset class weightings, or securities of model portfolios and all client accounts are updated

Visit our web site or call to learn more to get started.



scaled SOLUTIONS

Minuteman's total platform fulfills a wide range of portfolio management needs. However, for those advisors who are looking for a simple tool to take some of the headache out of portfolio rebalancing, this low cost, stand-alone program is the ideal solution.



TOTAL platform

Need more than the stand alone program offers? Consider the MAS Total Platform. Advisors transitioning to passive management strategies or making a move to being independent will find our total platform to meet or exceed their asset management needs.



software SUPPORT

We provide one-on-one training for all new customers and offer ongoing technical support by phone or email, in case you ever encounter any difficulties. And should you ever need to update information on your custom web page, we'll do it at no extra charge.