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## Independent Financial Partners Selects SMartX Advisory Solutions as Their Managed Accounts Platform

SMartX Advisory Solutions (“SMartX”), a leading financial technology provider and Turnkey Asset Management Platform (TAMP), and Independent Financial Partners (IFP), an independent broker/dealer and multi-custodial RIA with over 200 advisors nationwide specializing in wealth management and retirement plan consulting, have announced they will partner to provide IFP’s advisors with access to SMartX’s cutting-edge unified managed accounts solution.

The partnership provides IFP’s advisors with access to the award-winning SMartX managed accounts platform, which streamlines the initiation, construction, and implementation of client portfolios across custodians. SMartX gives IFP advisors a single intuitive interface to efficiently manage and maintain their clients’ investment portfolios, with access to a full spectrum of portfolio management tools including drift management and built-in account rebalancing, as well as access to over 500 investment strategies provided by almost 200 asset managers. Integrated OCIO services assist advisors to create and oversee suitable investment portfolios for their clients, while the unified managed accounts (UMA) functionality reduces the operational burden of opening and managing multiple separate accounts for third-party investment strategies. Furthermore, SMartX’s and IFP custodian-agnostic approach to investment management gives advisors the flexibility to choose the custodial counterparty that best suits their needs.

“IFP’s game-changing approach is raising the bar for independent broker-dealers, and we are excited to be a part of that effort,” said Evan Rapoport, CEO of SMartX Advisory Solutions.

“We wanted to change the way financial advisors provide wealth management services to clients,” said Bill Hamm, CEO of Independent Financial Partners. “Our approach has been to partner with firms like SMartX that represent the best in breed solution in their segment of the wealth tech stack, which will allow us to stay years ahead of our competition.”

SMartX launched its ground-breaking UMA solution less than two years ago with real-time trading technology and access to investment strategies typically managed exclusively by hedge funds. Leveraging their technology advantage, SMartX became the fully integrated managed accounts solution for SS&C Advent and has expanded its functionality to meet the growing needs of the mounting movement to independence as more and more firms seek to differentiate themselves with a scalable, discernable investment solution.

### About SMartX Advisory Solutions

SMartX Advisory Solutions ([www.smartxadvisory.com](http://www.smartxadvisory.com)) is the next generation turnkey asset management platform and the only platform to seamlessly offer traditional, alternative, and passive direct index strategies in a unified managed account structure. The firm also uses its proprietary trading and managed accounts technology to power SMartX ([www.smartx.us](http://www.smartx.us)), SS&C Advent’s integrated unified managed account solution.

### About Independent Financial Partners

Independent Financial Partners (IFP) (<http://ifpartners.com/>) is a registered investment adviser, broker-dealer, and insurance agency providing technological, compliance, marketing, business development, and operational support to its network of over 200 financial advisors. Founded in 2000 by William E. Hamm, Jr., IFP operated as a hybrid RIA and OSJ for 19 years before launching its own broker-dealer in 2019. IFP offers a platform for truly independent financial advisors, one built on choice, transparency, and advisor feedback.