



## NEWS

### For immediate release

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## Securities America Develops Unique Approach to Unified Managed Accounts

LA VISTA, Neb. – July 8, 2011 – Advisors can now combine separately managed accounts and mutual fund wraps in a single Unified Management Account, a unique approach created with Envestnet on Securities America’s Managed Opportunities fee-based advisory platform.

According to Envestnet, a leading provider of wealth management solutions to independent financial advisors, UMAs are among the fastest growing investments in the industry today. By 2013, an estimated \$327 billion in client household assets will be managed through UMAs.

“UMAs were originally designed as a way to bring multiple separate account managers into one account,” said Dennis King, senior vice president of business development for Securities America Advisors. “Working with Envestnet, Securities America has taken the UMA strategy one step further by developing a UMA that brings mutual fund wrap strategists into one account. No other firm does that.”

Advisors can include multiple SMA or mutual fund portfolio managers within the Managed Opportunities UMA or create their own models by choosing any of the separate account or mutual fund wrap portfolios on the Managed Opportunities platform.

“Advisors who have delayed converting their practice to a fee-based model because they perceived it as too much work have no reason, with the Managed Opportunities UMA, to delay any longer,” King said.

Because UMAs require only one client registration, one account, one set of paperwork and one 1099, advisors can spend more time building client relationships and gathering new assets. Portfolios and investment policy statements – customized to an individual client’s securities restrictions, tax concerns and cash management needs – can be created online in about 10 minutes. Advisors have online access to rolled-up reports, updated

daily, on assets at a household level, regardless of different registrations or money managers used.

***About Securities America***

Headquartered in La Vista, Neb., Securities America, Inc. has more than 1,800 financial professionals nationwide with approximately \$46 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than \$15 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. For more than 25 years, Securities America's mission has been to foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at [www.securitiesamerica.com](http://www.securitiesamerica.com).

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