

Folio Institutional Solutions



The Challenge

Patrick Ifrah – President, CEO and one of the founders of Ifrah Financial Services (IFS) – wanted to offer clients more than just mutual funds. Although this Little Rock, Arkansas-based registered investment advisory firm had a growing business, Ifrah knew that he could be doing more for clients.

“Back in 2001, I had the idea of offering model portfolios made up of individual equities to meet a variety of client objectives and risk parameters,” Ifrah recalls. “But we couldn’t figure out how to do it efficiently and cost effectively. Even though we were automating our business wherever we could, there was no way we could afford to build a platform on our own. And any software options I looked at were too complex, too hard to implement, expensive and not well integrated with a custodian.”



Folio Institutional Made it Happen

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The Folio Institutional Solution

Certain that there “had to be somebody who’s doing web-based modeling,” Ifrah found Folio Institutional through an Internet search. “There really wasn’t anybody else out there offering this,” he says, “but in order to be confident in offering our model portfolios to clients, we had to build up a track record and make certain that the Folio Institutional platform modeling tools would work.” So Ifrah implemented a six-month trial program, and upon its successful completion started offering model portfolios to clients.

IFS now has a more diverse product offering that better serves its client base. “With Folio Institutional, we can manage a large number of accounts investing in individual equities,” says Ifrah. “And they don’t all have to be \$1 million or more. Many of our clients have multiple, related accounts – some as small as \$10,000. With Folio Institutional’s fractional share capabilities, we can serve all of the client’s accounts with the same portfolio management service, whether they are small, large, or somewhere in between.”

Ifrah points out two more benefits of moving beyond the mutual fund-only approach: “We can manage portfolios with greater tax efficiency than mutual funds. And the on-line client reporting tools are great.”

New Business Opportunities

Folio Institutional services also created new business opportunities for IFS. Utilizing Folio Institutional services, IFS now offers the iFocus Portfolio – a service aimed at providing investors access to world-class financial services and money management in an efficient on-line format. Ifrah states: “With iFocus Portfolio, investors who want to operate in a streamlined, web-based environment can sign up for the program and get started in just minutes.”

Initially, IFS offered about eight different model portfolios. Now, with the inclusion of the web-based iFocus Portfolio, the firm has nearly doubled the model portfolios available to its clients.

With Folio Institutional, IFS is a more diversified – and a more profitable – financial planning and investment management firm that can pass along its savings to clients. “Folio Institutional not only saves us money operationally even as we’re growing our business,” Ifrah concludes, “we actually save our clients money as well.”

About Folio Institutional

FOLIO*fn* Investments, Inc. delivers innovative investment solutions to financial professionals and institutions through Folio Institutional.

At the core of all Folio Institutional products and services is our proprietary trading platform. This easy-to-use, web-based investing system enables users to customize portfolios of securities - called Folios - which they can buy or sell in a single transaction, and which financial institutions can easily make available to thousands of accounts.

Through our commitment to innovation, partnership and service Folio Institutional provides unique products and services that enable you to serve your clients better, operate more efficiently, and grow your business more quickly. Hundreds of investment firms currently use Folio Institutional platform, enabling them to offer some of the most innovative investment programs available today.

What Can We Do For You?

At the core of Folio Institutional is our fully integrated, cost-effective, dedicated account management and trading platform designed for advisors like you. We provide the tools you need to take your practice to the next level.

To learn how we can work for you, or to schedule a no-obligation demonstration, please visit our website at www.folioinstitutional.com or call us at **888-485-3456**.



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