



POWERED BY
XY PLANNING
NETWORK

WHAT IS XYIS

Our main goal is to help you scale your growing business without the pressure to hire a team or work longer hours. We want to help save you time so you can focus on what you love about financial planning and helping clients reach their ideal life.

WHAT MAKES XYIS SO SPECIAL?

In addition to its robust tech platform, XYIS offers access to our concierge support team for platform assistance, as well as our investment team for personalized investment advice.

Our platform is built with the modern advisor in mind and we have partnered with powerhouses in the financial services industry: East Bay Financial Services, Dimensional Fund Advisors, Orion Enterprise, and TD Ameritrade Institutional.

PRICING

AUM	BASIS POINTS
\$0 - \$5mil	35
\$5mil - \$25mil	30
\$25mil+	25

CONTACT DETAILS

360-301-7579
support@xyinvestmentsolutions.com

FEATURES

Streamlined Asset Management

XYIS handles the time-consuming task of researching, performing due diligence, monitoring, trading and rebalancing your firm's assets under management.

Simplified Back Office and Personalized Service Team

XYIS will facilitate trading, rebalancing, billing, and invoicing for your firm. We also act as your personalized service team giving you just one phone number to call - don't worry about calling TD - we'll take care of that for you. We leave you free to focus on serving your clients.

Resources & Training

XYIS firms will gain access to exclusive content on practice management and industry best practices. As an added benefit, their clients will also get access to timely information on the markets and how it affects their portfolios as well as other webinars on personal finance.

Top-Tier Investment Team

Through our partnership with East Bay Financial Services, XYIS firms leverage our collective expertise to build portfolios that align with clients' risk tolerance and goals.

Specialized Support Team

XYIS offers a specialized support team dedicated to making your job easier. This team manages onboarding, answers questions and handles service requests, and works with powerhouse partners like TD Ameritrade, Orion Enterprise, and DFA on your firm's behalf.