



**BURNEY  
ADVISOR  
SERVICES**  
Richard Mitchell  
Vice President  
Business  
Development

Burney Advisor Services is a platform that supports all aspects of running an RIA—investment management, financial planning, technology, cybersecurity, professional services and staff support—while preserving an advisor's independence.

Nearly 50 years ago, advisors began using our active equity analytical system to grow their client portfolios. Seeing our tools and resources positively impact advisors and their clients, we expanded our support model to enable advisors to do even more.

The result is Burney Advisor Services. BAS provides what you need—and want—to meet your goals. Are you launching an RIA, growing an existing one, or working on a succession plan? Let's work together to get you there



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**The Burney Company**, an Investment Advisor registered with the Securities and Exchange Commission, has formally launched Burney Advisor Services (BAS), its platform serving breakaway and independent RIAs with investment research, asset management, technology and cybersecurity, transition support, peer advisor networking, and more.

The flexible solution supports advisor independence by delivering tools that enable advisors to excel, through a fair and transparent pricing model.

“For decades, we’ve supported advisors with our active investment tools and analytics, allowing them to offer better investment management solutions to their clients,” says Lowell Pratt, BAS President, “Pairing that with industry-leading technology supplemented by proprietary technology and cybersecurity offering, we’re excited to launch BAS and empower independent advisors to take their firms to the next level.”

BAS is uniquely positioned to serve both breakaway and independent RIAs through three service packages, tailoring support levels to the unique needs of each firm.

“There are more financial advisors than ever evaluating how to go about establishing their own RIAs, and existing RIAs who are looking to integrate more services and solutions into their practices through strategic partnerships,” says Pratt, “Through the BAS platform, we are proud to offer many of the systems traditionally provided by broker-dealers, but without the high costs and commitments they impose on their advisors.”

BAS utilizes an active investment philosophy to meet client needs by leveraging alternatives as well as traditional investments. Partnering with BAS allows RIAs to access trading technology, model portfolios, research, and more – a fully outsourced investment management solution designed to make running RIAs easier.

Through BAS, advisors also have access to the community support of other independent firms and advisors. Offering conferences, networking opportunities, and sub-communities, BAS connects advisors with similar goals, ideas, and priorities – serving as a catalyst for identifying mergers, acquisitions, and succession plans.

**New business contact:**

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**Client Goals:** Wealth Accumulation, Retirement Income, Wealth Protection, Income, Investment Management

**Year Program began:** 1974

**Managers on platform vetted:** Yes

**Managers GIPs® compliant:** Yes

**Type of products available:** TAMP

**Program uses platform to track reporting of clients holdings:** Yes

**Program is compatible for:** Established RIA's, Breakaway RIA's

**Proposal Generator:** No

**Program links to trust accounting system:**

No, but could be created

**Generates investment policy statement:** Yes

**Asset Allocation methodologies:** Mean-variance optimization to obtain efficient frontier for the specified assets classes based on historical and forward-looking risk-return spectrums in order to achieve higher expected risk-adjusted returns and improve diversifications.