

Investment Advisory Services, Inc. Wins Fidelity 2016 Be Greater Award

FIDELITY INVESTMENTS NAMES INVESTMENT ADVISORY SERVICES WINNER OF THEIR SECOND ANNUAL "**BE GREATER**" AWARD

THE WOODLANDS, TX, October 19, 2016

Investment Advisory Services, Inc. (IAS) a wealth management firm based in The Woodlands, TX, has received the 2016 Fidelity **Be Greater** Award, which recognizes financial services organizations that have succeeded in becoming future ready, responding to investor and competitor dynamics, and evolving into successful, growing businesses.

The award, presented annually by Fidelity Clearing & Custody Solutions, the division of Fidelity Investments that provides clearing and custody to registered investment advisors (RIAs), recognized Investment Advisory Services as its national 2016 award winner among all RIA firms considered having \$50 - \$250 million in total assets under management.

John Haynes, President of IAS accepted the 2016 **Be Greater** Award from Bob Oros, Executive Vice President of Fidelity Investments on October 18, 2016 at the awards ceremony in New York City.

The **Be Greater** Awards were created to honor those firms who push boundaries and demonstrate excellence in critical areas of their business. Fidelity noted in its announcement this week that Investment Advisory Services stood out for their focus on strategy and leveraging technology in order to become more future-ready. Located in The Woodlands, Texas, this six-person firm combines goals-based planning with portfolio design. They also provide support for broader life issues such as estate planning and risk management, working in conjunction with strategic partners. Investment Advisory Services utilizes technology to enhance the client experience, while also improving efficiency and reducing costs. Their central open-architecture platform integrates several workflows including

account aggregation, a client portal, financial planning capabilities, CRM and document management software to "go paperless."

Investment Advisory Services is using its small, tight-knit team as a competitive advantage to quickly adopt new technologies as well as develop a personalized client experience. "Our business is about relationships," says Mr. Haynes. "And, our staff enjoys being part of something that provides a benefit to others. We continually look for feedback from clients to understand what they value most when working with our team, and then provide an experience we hope will motivate them to tell others about how we can help."

"To be awarded this distinction is a tremendous honor for our firm," said Mr. Haynes. "This award is a reflection of the dedication and commitment of our entire team in providing personalized service to our clients and their families."

"Today's dynamic environment requires firms to focus relentlessly on growth and efficiency to remain competitive," said Bob Oros, Executive Vice President and head of the RIA segment, Fidelity Clearing & Custody Solutions. "This year's **Be Greater** winners demonstrated their commitment to excellence across critical areas of their businesses that will help them become future-ready and achieve long-term success."

Investment Advisory Services was chosen for the award by an esteemed panel of industry professionals: Karen Barr, Investment Adviser Association; Joel Bruckenstein, Technology Tools for Today; Mindy Diamond, Diamond Consultants; Beverly Flaxington, The Collaborative; Brian Hamburger, MarketCounsel; and Philip Palaveev, The Ensemble Practice.

The award was presented at Fidelity's Inside Track event in New York on October 18, 2016. This is the second year that Fidelity has issued the **Be Greater** Award.

As part of the **Be Greater** Award, Fidelity will make a donation in the amount of \$15,000 to the charity of Investment Advisory Services choice. IAS has selected Henry's Hand and The Montgomery County Women's Center to receive the donation based on their work in the community to make a difference in people's lives.

Read more about Investment Advisory Services and the 2016 **Be Greater** award at go.fidelity.com/begreaterawards.

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The 2016 **Be Greater** Awards were open to current clients of Fidelity Investments who met certain eligibility requirements, including but not limited to (1) at least \$50 Million in total assets under management, (2) more than two full-time employees, (3) in business for 4 years or more prior to January 1, 2016, (4) not under investigation by any regulatory or government agency or enforcement division, and (5) completed the program application, and acknowledged and agreed to the terms and conditions set forth in the program rules and regulations.

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