

The Life Management Group introduces its next generation wealth management platform for clients utilizing Adhesion's WealthADV

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Houston, TX based The Life Management Group (TLMG) has recently introduced to clients its 'next generation' wealth management platform. An integral component is Adhesion's WealthADV Unified Managed Account (UMA) and Client Reporting platform.

"Relatively few investors have access to such an array of benefits and features," states G. Michael Beduze, TLMG's founder and CEO. "Through partnering with Adhesion, we have significantly expanded our firm's technological and investment management capabilities to deliver a totally customizable experience that accommodates any client's investment style and preferences. Our new platform is allowing us to expand our capabilities to serve an increasingly affluent clientele and to partner with other financial institutions."

Some of the highlights of TLMG's enhanced wealth management service to clients include:

- **30% to 50% reduction** of investment management costs;
- Access to a wide array of world class investment managers;
- Multiple investment strategies, managers, and asset classes implemented in a single client account;
- Tax efficient portfolios designed to produce enhanced after tax returns;
- 24/7 Internet based "investor console" to view holdings and returns, and access to much improved reports including enhanced analytical information and descriptive charts and graphs;
- Multi-custodian wealth management platform with outsourced reconciliation, reporting, overlay portfolio management and trading.

According to Rich Conley, Adhesion's SVP of Sales, "The Life Management Group is now separating itself from its competition. Higher client satisfaction, greater investment choice, better reporting, and scalability for the firm puts TLMG squarely in an enviable position to grow their business. TLMG made very quick work of the transition to WealthADV UMAs and Reporting from their old way of doing business and has now picked up a strategic business advantage at a time when many other RIA firms, trust banks and brokerages are either standing still or retreating."

Beduze adds, "With the WealthADV platform the process of investing our clients' assets is much more efficient and I am able to monitor the implementation and performance of our investment strategies on-line from anywhere. In the past, rebalancing, trading and account reconciliation used resources that we now can direct to enhancing other client services. Our clients find significant value in our new WealthADV online inquiry and reporting portal, which in turn increases our brand exposure."

WealthADV



Is Managed Investing

About Adhesion Wealth Advisor Solutions

Adhesion has been delivering wealth advisor solutions since 1999. Its WealthADV platform is a comprehensive Managed Investing service, providing the complete unified managed account, client reporting and back office solutions RIAs need to stay at the forefront of the market and grow successful practices.

About The Life Management Group

At Life Management Group our passion and purpose is to assist individuals, families and businesses discover and reach their full potential, achieve dreams that may have once seemed unreachable, and to leave a legacy that will impact generations to come. We accentuate both the art and the science of life; creating a richer, more fulfilling life experience in which 'wealth' is defined by an abundance of all four life currencies: time, talent, money, and relationships.™ This is achieved working from 'the inside out' through clarity of vision, values, and goals which then guide a proprietary process designed to produce optimal results, simplicity and peace of mind. TLMG is a shareholder firm of National Advisors Trust Company. To learn more please visit with us at <http://www.lifeplanninggroup.com/>

WealthADV is a registered trademark of Adhesion Wealth Advisor Solutions