

IPA/Chalice Financial Partnership Offers Discounted Services to Members

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The Institute for Portfolio Alternatives (IPA), an advocacy and education group for non-traded alternative investment products, has partnered with Chalice Financial Network to provide its members with discounted access to the company's online marketplace of business, technology and client services. IPA members include registered investment advisors, broker-dealers, asset management companies and business partner firms.

Chalice Financial Network is a provider of third-party technology, asset management, wealth management and business enterprise services for independent financial advisors.

"Through our new partnership with Chalice, we are able to provide our 200-plus member firms and 1,700-plus individual members with a greater ability to operate their businesses efficiently and serve their clients more effectively," said Tony Chereso, IPA president and chief executive officer. "Many of the solutions on Chalice's



marketplace align closely with what our members have told us they want, and we are proud to be able to offer them access in a cost-effective way.”

IPA members will have discounted access to an employee medical benefits package that offers large-group health insurance; a private-label platform to upgrade client service, technology and business solutions; compatibility scoring, merger and acquisition consulting, and deal support through Chalice’s Succession Link 2.0; and cyber security protection and insurance through the Chalice Cyber Security Protection Package.

The IPA, through advocacy and education, seeks to raise awareness of investment products with low correlation to the equity markets, which include non-traded real estate investment trusts, business development companies, interval funds and direct participation programs.

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