



TRUST & WEALTH
MANAGEMENT
SYSTEMS

Press Release

Self Directed IRA Services, Inc. Enhances its Trust and Custody Capabilities with Innovest Systems

New York, August 30, 2011 – Self Directed IRA Services, Inc., a custodial and administrative services company that provides solutions for individual retirement plans, announced today that it has implemented InnoTrust, Innovest Systems’ trust and wealth management platform. After a seamless conversion process, InnoTrust now provides SDIRA Services with a cost-effective and highly customizable solution to support the investment management, account administration and reporting needs of SDIRA Services’ clients.

Innovest Systems’ flagship product, InnoTrust, is a secure, integrated, real-time trust and wealth management technology platform provided in a highly flexible and scalable Software as a Service (SaaS) model. This browser-based open architecture system comprehensively addresses the needs of trust companies, banks, private banks, retirement plan administrators and others that need to control, account for, and report on assets held in trust, wealth management and custody accounts.

"After searching the marketplace, we chose InnoTrust because it addresses our needs with an innovative solution that is highly configurable and easily customizable to meet the fast-growing demands of the retirement servicing business," said Kelli Click, SDIRA Services’ chief operating officer. "With InnoTrust, we can easily meet our clients’ needs and be positioned to grow and change as new market opportunities arise. We have found Innovest to be highly responsive and look forward to working with a strategic partner that understands how to deliver efficient solutions and offers outstanding support."

"We are thrilled to be partnering with Self Directed IRA Services," said William Thomas, Innovest’s chief executive officer. "Implementing InnoTrust will facilitate SDIRA Services’ continued growth in the retirement planning industry, optimize its processing and offer its clients a thoroughly state-of-the-art experience."

About Innovest Systems

Innovest Systems is a financial technology firm that provides technology-driven solutions to trust and wealth management companies. Innovest’s flagship product, InnoTrust, is a secure, integrated, real-time technology platform offered in a Software as a Service (SaaS) model. Innovest’s technology meets the needs of smaller independent trust and wealth management companies, as well as the world’s largest global financial services firms. Innovest is headquartered in New York City. For more information about Innovest Systems, visit www.innovestsystems.com.

About Self Directed IRA Services

Formed in 2008, Self Directed IRA Services, Inc. (SDISI) has quickly gained national presence as an IRA provider specializing in the custody of alternative and traditional assets in self-directed IRAs. As a subsidiary of Horizon bank based in Austin, Texas, SDISI serves clients nationwide, and it works with investment advisors, broker dealers, tax and real estate professionals and investment issuers. Additional information about SDISI may be found at www.sdiraservices.com.

The firm’s focus is to deliver exceptional service to clients, with attention to detail and dedication to the long-term needs of clients and the professionals with which it works. SDISI performs the duties of a custodian and does not provide investment advice or sell investments, nor offer any tax or legal advice.

For More Information:

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