
A PARTNERSHIP THAT MAKES A DIFFERENCE

At OBS Financial, we partner with financial institutions, bank Trust officers, investment advisors, and retirement plan professionals to efficiently grow their businesses. We offer viable investment, sales, marketing, operations, and technology solutions that drive new revenue and sharpen your competitive edge.

Our investment approach is strategic and proven: we strive to capture – rather than beat – the financial markets. Our customer service model is flexible and accommodating; simply put, we do business the way you do, so working with us is easy.

It's our mission to work together – with our clients and with each other – to provide investment solutions that increase our business partners' financial success. Toward that end, it's our shared belief that we can make a difference in people's lives.

GET CONNECTED!

WE'LL MAKE YOU MORE EFFECTIVE IN YOUR JOB



Outsourcing

Technology

Practice Management

Support

You make a living investing other people's money.
We make a living helping you sleep at night.

OUR SOLUTIONS

At OBS Financial, we're dedicated to helping bank Trust officers, investment advisors, and retirement plan professionals efficiently grow their businesses.

Our experienced staff delivers solutions that consider each Financial Institution's unique challenges – and that assist in expanding your client base and assets under management.

Traditional Trust	Retail/Broker Dealer	Retirement Solutions	Small Accounts
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OBS Financial provides sub advisory capabilities for bank Trust departments utilizing portfolios in our Efficient Frontier Series. Our Trust solutions integrate with retail delivery by offering low trading costs, institutional share class pricing, multiple rebalancing options, and client reporting.

Utilizing our Epicenter Technology Platform, we provide data interfaces with most major custodian and trust accounting systems.

Learn more about our [Epicenter Technology Platform](#).

A little bit about us...

OBS Financial provides investment and operations outsourcing services to financial institutions around the country. Our clients include bank Trust departments, retail broker dealer advisors, independent financial advisors, and retirement plan professionals. We offer an array of fee-based products and platforms intended to help you easily – and profitably – grow your business.

[LEARN MORE](#)

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OBS Financial Services is a Registered Investment Advisor with the Securities and Exchange Commission.

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