COMPLIMENTARY CARES SCORE ®

GET STARTED (/CARES_SCORE)

About Us

Our belief is that Financial Success is Only Achievable if Clients, Advisors, and Resources (Companies) work together with an Effective System (The CARES Process™) to create Value, Sustainable Relationships, and our Mission of Making Life Better™ For Everyone™!

"Everyone is Independent for Choices and Interdependent for Success" – Someone Who CARES™

CARES COMPANIES™

We are three companies who, together, provide a complete, integrated suite of financial products and services.

Interactive Financial Advisors

(A National SEC Registered Investment Advisor) specializes in providing fee-based advisory services - investment analysis and solutions.

Unifinancial Corporation

(A National Risk Management company) is a national firm focused on developing and implementing new style risk management analysis systems and solutions.

OrganizAmerica

(A National Financial Information Services company) is a company focused on information technology services that are essential for clients, advisors and resource companies to make better financial decisions and to provide tools to manage the flow of vital and relevant information.

Find An Advisor (/find_advisor)

Resource Partners

We partner with the best of breed technology companies in the business to help you reach your goals.

Emotomy is a cloud-based turnkey robo-advisor platform designed for financial institutions. Emotomy's technology helps financial advisors design, optimize, track, and share client portfolios with their own proprietary investment strategies. Emotomy also provides plug-in investment strategies and overlay signals that complement IFA's proprietary strategies. Emotomy has been a strategic partner of IFA since 2012 and has helped IFA provide our advisors an in depth solutions comparison to construct custom portfolios based on each individual client's needs.

Since 1972, Trust Company of America (TCA) has been a champion of Registered Investment Advisors, dedicated to helping them realize their full potential. TCA is the only independent RIA custodian offering fully integrated real-time technology, consultative services and back office support built exclusively for RIAs. TCA has been a strategic partner of IFA since 2004 and has made asset custody a stress free solution.

(https://www.facebook.com/Trust-Company-of-America-150770349258203) (https://www.linkedin.com/in/trust-company-of-america-3425203)

Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office and email archiving solutions in the financial services industry. Easily affordable, easy to implement and offering integration with many of the industry's most widely-used applications, Redtail is committed to providing financial advisors with the core technologies that drive their day-to-day operations. Redtail has been a strategic partner of IFA since 2004 and has helped IFA develop new and innovative solutions for servicing our clients.

(https://twitter.com/RedtailCRM) (https://www.facebook.com/RedtailCRM) (https://www.linkedin.com/company/redtail-technology)

OAKTREE Brokerage is one of the largest national insurance marketing organizations in the country. With a full line of life insurance, annuities, DI, and LTC products, OAKTREE serves agents nationwide. Every member of the OAKTREE Brokerage staff is motivated to help you get your applications submitted, approved and placed as fast as possible -allowing you more time in the field with your clients. Our team provides a consultative approach with expert support and service for your growing financial practice.

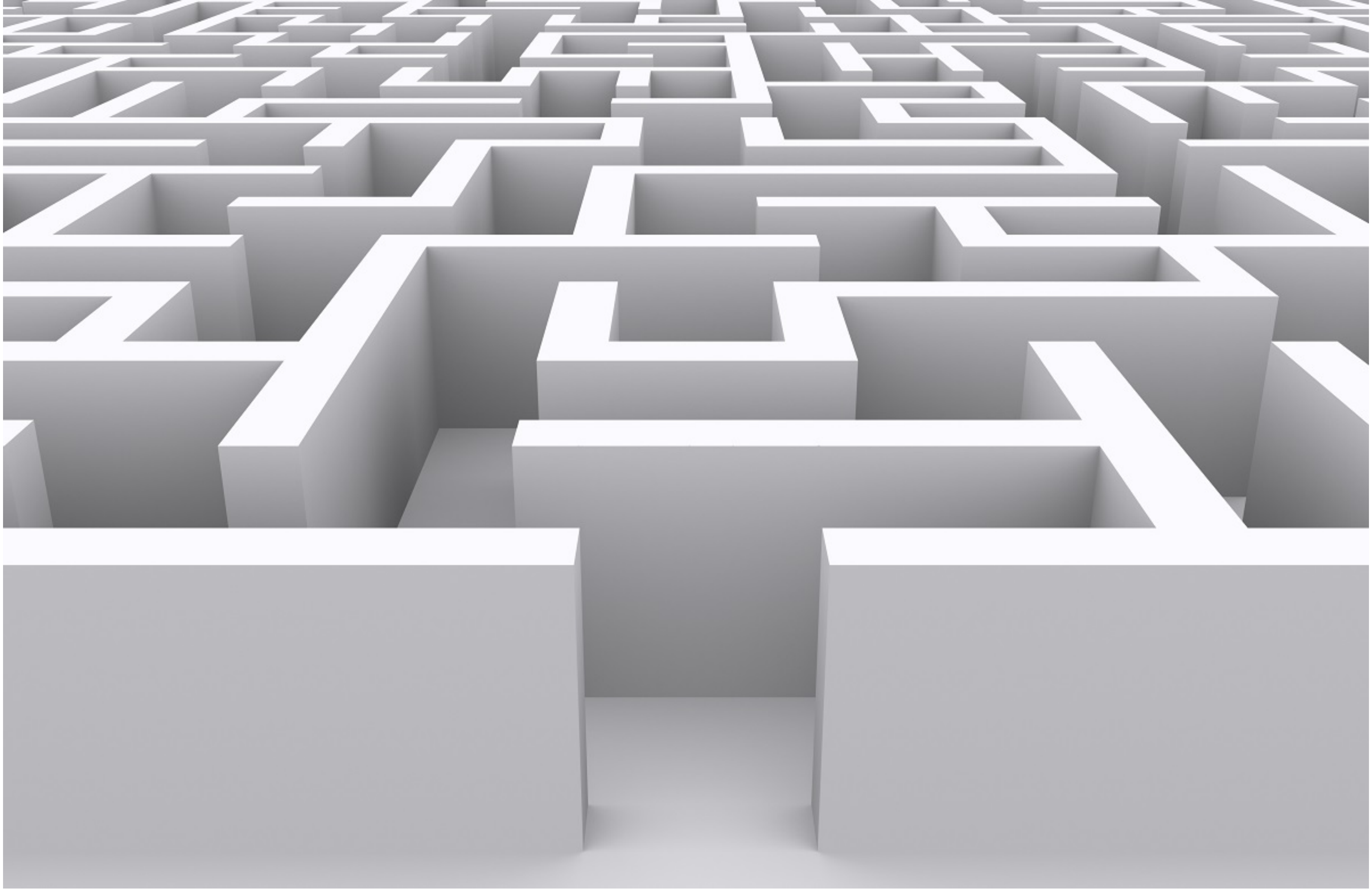
(https://www.facebook.com/OAKTREE-Brokerage-1790734725787660/) (https://twitter.com/sellwithoaktree) (https://www.linkedin.com/in/sellwithoaktree/)

CARES Process ™

Step 1: Relationship

A discussion to create an awareness of the issues you will need to consider to determine your level of caring and commitment to your personal financial success using our self-evaluation CARES Score ®.

Complimentary CARES Score ® (/cares_score)



Step 2: Discovery

An interactive discussion where we listen and record what is really important to you. Essential information will be gathered to clarify your financial objectives and what you feel would Make Life Better for You.

Step 3: Analysis

We analyze and review with you, your specific financial situation, using our unique Making Life Better™ Calculator. This helps you clarify your expectations and prioritizes your goals and commitments.

Retirement Calculator (/calculators/index)

Step 4: Solutions

Based on your financial situation analysis and the priorities you have identified, appropriate solutions will be custom designed and presented. These solutions will be focused on your success.

Step 5: Service

We will establish a well-structured communications and service schedule with you to stay on track and make any necessary future adjustments.

Become a Financial Advisor who CARES ™

Opportunity to Become an Advisor Who CARES ™

Learn More (/become_a_financial_advisor)

Contact Us

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