Just as human relationship is not programmable; neither is serving clients.

Since 1992, IRA Group has been serving clients who seek personalized relationships and customized financial and regulatory guidance. We believe our clients appreciate outstanding service as well as a disciplined investment process. With an average industry tenure of over 29 years, our associates have the knowledge and experience to assist our clients in achieving successful outcomes.

Institutional Advisory Services

Private Client Services

The Team

Institutional Advisory Services

We work with plan sponsors to maximize the value of their retirement plans in pursuit of successful outcomes for plan participants

IRA Group provides investment fiduciary services to management committees responsible for the oversight of corporate retirement plans, foundations, and endowments

Defined Contribution

- Investment Policy
- Asset class representation
- Investment evaluation and selection
- Investment style, performance and risk monitoring
- 404(c) compliance monitoring
- Fee and plan design benchmarking
- Service provider RFP
- Employee communications
- Online fiduciary center

Defined Benefit, Foundations & Endowments

- Investment Policy
- Spending Policy
- Asset class representation and allocation guidelines
- Investment evaluation and selection
- Investment style, performance and risk monitoring
- Active strategic and tactical portfolio management
- Expense management
- Online fiduciary center

Private Client Services

We engineer a purposeful course of action based
on our clients' unique set of circumstances

IRA Group takes a holistic approach to private wealth management. We provide customized investment solutions utilizing our proven institutional investment process. Our proprietary research and portfolio management methods consider strategic investments for inclusion in portfolios based on clients' personal financial objectives.

Wealth Planning and Management

- Cash flow analysis & risk assessment
- Liquidity needs management
- Customized asset allocation
- Financial planning
- Tax management
- Coordination with other professional advisors – attorneys, accountants etc.

Investment Management

- Institutional investment discipline
- Formal investment policy statement
- Portfolio asset class representation & allocation guidelines
- Securities evaluation & selection
- Securities style, performance & risk monitoring
- Ongoing strategic & tactical portfolio management

Client Service Delivery

- Dedicated relationship manager
- Quarterly portfolio analysis
- Annual investment review
- Client portal – daily online access, account aggregation
- Coordination of cash distribution, wires and gifting

The Team

DOUGLAS B. LEESON

Principal

SERE E. AUSTIN

Managing Director

LEXI Z. BONNER

Director Private Client Services

JOHN R. FRAZER

Managing Director

KELLY M. FREEMAN

Director Operations & Administration

PATRICK T. HARRIS

Managing Director

DANIEL R. JOYCE

Managing Director

JUDY JOLLEY

Chief Compliance Officer, Managing Director

ASHLI B. SMITH

Managing Director

ALICIA STOVER

Managing Director

ANDREW T. SUTTON

Director Research & Reporting