

For advisors & firms

Custody infrastructure for the firms that serve investors.

Put your clients' traditional and alternative assets on one modern custody platform — with your brand on the portal, clean reporting, and the operational plumbing handled.

\$16B+

ASSETS SECURED

2.3M+

ACCOUNTS PROTECTED

\$0

SECURITY-RELATED LOSSES

Figures describe the security and processing integrity of the underlying platform as of December 31, 2025 — not investment performance, and not a guarantee against investment loss.

What you get

- ✓ **White-label portals** under your own brand
- ✓ **One ledger** for traditional and alternative holdings
- ✓ **Automated** subscriptions, capital calls, and settlement
- ✓ **Per-record authorization** with a tamper-evident audit trail
- ✓ **Reconciled, audit-ready** reporting and statements
- ✓ **APIs and data feeds** that fit your existing stack

Built for your book

Advisors, RIAs, family offices, and institutions use the same platform — self-directed IRAs and trusts for individuals, private-fund and alternative-asset custody at scale, with capital calls and settlement handled.

RIAs

Family offices

Fund administrators

Institutions

Partner with us: book a demo at investorservices.com · hello@investorservices.com

Educational only. Not investment, legal, or tax advice. Availability follows each account's governing rules.