

# RIA in a Box.

SEI Strategic Partner



## Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs, save time and increase efficiencies** to run a more successful firm.

## RIA in a Box

RIA in a Box, a Comply company

RIA in a Box, a COMPLY company, is a regulatory compliance solution for investment advisers and wealth management. Meticulously aligning technology, consulting and education solutions to deliver an exacting solution to meet the unique needs of your registered investment adviser (RIA) firm.

Registered investment adviser (RIA) firms use the platform to increase compliance workflow efficiency and to automate regulatory requirements. RIA in a Box is part of the COMPLY portfolio of firms, which includes ComplySci, RIA in a Box, NRS, illumis, and ITEGRIA.

As part of the RIA in a Box solution, ITEGRIA empowers elite RIAs with fast, compliant, secure access to all data and tools from any location on virtually any device. Our Advisor Virtual Desktop environment is designed exclusively for RIAs and includes an RIA-centered Support Desk along with industry-specific strategic guidance on technology trends, security, and technology-related regulatory compliance.

### Contact

[info@riainabox.com](mailto:info@riainabox.com) / (866) 611-7638

### Discount

10% off monthly per-user fee for both the Compliance Service and the Cybersecurity Platform  
(Waive service fee for the first month of service)  
Waive implementation fee

### Website

[www.riainabox.com](http://www.riainabox.com)

### Important information

SEI is not affiliated with any firms mentioned herein. SEI Global Services, Inc. has contracted with listed vendors to provide these services to Independent Advisor Solutions by SEI clients. SEI does not endorse the use of any of the products mentioned herein. Always check with your firm's compliance department before implementing any new technology solutions.