



Ways to Join

Active investment strategies that perform!

With experience offering advisory services since 1974, Burney Advisor Services is uniquely positioned to deliver investment management support for your practice. Spend more time at the forefront of your business fostering relationships with clients and less time behind the scenes making investment decisions.

Affiliation options are grouped into two main categories: Outsourced CIO and Separately Managed Accounts.

	Outsourced CIO	Separately Managed Accounts
Transition Support	✓	✓
Proprietary Stock Selection Analytics	✓	✗
Proprietary Equity SMAs	✓	✓
Market Commentary + Investment Research	✓	✓
BAS Community of Advisors	✓	✓
Asset Allocation Advice/Framework	✓	✗
Model Portfolio Management and Rebalancing	✗	✓
Tax-Sensitive Transition Trading	✗	Add-on \$