

## Infovisa Announces Partnership with Unique Asset Partners

Cornelius, NC, November 2, 2015 – Infovisa today announced that it has launched a partnership with Unique Asset Partners LLC (UAP) to provide “unique asset” services. (Unique assets include real estate, interests in family businesses, life insurance, loans and notes, collectibles and similar investments that don’t trade on any exchange.) The partnership will give Infovisa clients the tools they need to manage unique assets efficiently and profitably.

Unique assets are important to the wealthy investors who own them. A 2013 IRS study found unique assets comprise roughly half of the investments owned by millionaires filing estate tax returns. A 2014 survey of estate tax attorneys found they are more likely to refer clients to a fiduciary willing to handle *all* their clients’ assets, not just the “easy” ones. A growing number of fiduciaries realize unique assets are an administrative challenge yet, done well, create opportunities to attract affluent new clients, grow assets and boost non-interest fee income.

Michael Dinges, Infovisa’s president, said, “Unique Assets Partners is widely recognized in the trust industry as the leader in the unique asset space. Many firms have used UAP’s consulting services on their journey from unique asset administration dysfunction to excellence. Others use UAP’s stable of approved vendors to provide unique asset services banks don’t wish to provide themselves. The bottom line is that we felt partnering with UAP will help our clients reduce their risk, increase their non-interest fee income and attract new assets.”

Brad Davidson, Unique Asset Partners’ managing director, said, “UAP is proud to be Infovisa’s unique asset partner. Mike and his team understand that unique assets represent a huge overlooked opportunity for fiduciaries serving the wealthy. Given how vital they are to their owners, firms offering services for this investment class will be the winners. Now Infovisa clients have access to the tools and expertise they need for unique asset success.”

### **ABOUT UNIQUE ASSET PARTNERS LLC**



**Unique Asset  
Partners**

Unique Asset Partners LLC ([www.uniqueassets.com](http://www.uniqueassets.com)) is a “one-stop shop” providing everything professional trustees and owners need to manage unique assets successfully. *UAP Consulting* helps professional trustees upgrade their unique asset administration

practices. *UAP Management* offers the services owners need if they can’t manage the assets themselves. For details contact Brad Davidson, Managing Director; 240-553-1100 x107; [bdavidson@uniqueassets.com](mailto:bdavidson@uniqueassets.com).

### **ABOUT INFOVISA**



Infovisa is an independent provider of data processing systems and related services for bank trust departments, independent trust companies, not-for-profit foundations, colleges, and universities. The Cornelius, North Carolina company is privately held by a holding company that focuses on possessing companies that serve the financial services industry. For more information on Infovisa, please contact [salesinfo@infovisa.com](mailto:salesinfo@infovisa.com).