

Infinity Financial Services Offers CircleBlack Technology to Financial Advisors and Clients

Innovative investment tracking software enables Financial Advisors to offer digital access, market insights and personalized service

Oakland, CA ([PRWEB](#)) July 26, 2016 -- Infinity Financial Services is providing CircleBlack to its Financial Advisors and customers. CircleBlack, the innovative investment tracking software and service, enables them to integrate, view and manage their assets in a single comprehensive portfolio. After a four-month testing period, Infinity is making CircleBlack available to all advisors and clients August 1, 2016.

“We are proud to offer CircleBlack as a vital tool for our Financial Advisors to deliver real-time value to their clients. Today’s marketplace demands digital visibility, and this technology enables advisors to see and also share time-sensitive market insights customized to the clients' interests,” said Greg Gilbert, CFP®, President and Chief Compliance Officer at Infinity Financial Services, an award-winning national independent FINRA broker/dealer and registered investment advisor with offices across the country.

“Infinity Financial Services’ cutting-edge use of technology makes it an ideal partner,” said John Michel, CEO of CircleBlack. “In leveraging CircleBlack's technology, Infinity's Financial Advisors can deliver the kind of personalized information and digital access that clients increasingly expect from them.”

CircleBlack provides a detailed view of the client’s holdings, performance, risk exposure and transactions. It can also be integrated with other CRM, planning, risk and trading tools, and can allow clients to add in assets held in other locations.

“For advisors, the real advantage is to get closer and collaborate with their clients. The information available through the technology – which includes 401ks, variable annuities, and 529 college savings plans that may not otherwise be visible to advisors – can validate their advice and make decisions in the context of the entire portfolio,” said James Simos, CFP® and Infinity Managing Principal at Infinity.

“We looked at many different vendors, but the CircleBlack’s management team was phenomenal in terms of their experience, skill and willingness to work with us to deliver value,” he added.

The CircleBlack offering is the latest in a robust suite of platforms Infinity is offering to empowers financial advisors in financial planning, asset management and Reg A+ IPO share purchases, in addition to clearing, compliance and administration processes.

About Infinity

Infinity is dedicated to enhancing clients’ financial lives with personalized wealth management and retirement plan services. Infinity offers an open-architecture platform of traditional and alternative investments, insurance products, professional asset management, and retirement plan advisory services to individual, small business and institutional investors. Infinity was named the Number One Gainer in Total Revenue and in Number of Representatives by InvestmentNews in its 2016 Annual Broker Dealer Rankings/Special Report. Collaborators since 2002, Gilbert and Simos founded Infinity in 2007. www.infinitysecurities.com

About CircleBlack



Built on cutting-edge technology, CircleBlack provides a usable, simple, secure, powerful platform that gives investors a complete picture of their wealth, curated portfolio inspired information that cuts through the noise to enhance financial literacy, and an up to-the-minute reporting engine that helps investors focus on what is truly important, their long term goals, without being distracted by daily market fluctuations. In doing so, CircleBlack facilitates rich conversations and more rewarding relationships between investors and their advisors. The platform is built for the 21st Century in a web-based application format that can be taken anywhere and accessed anytime, on tablet or smartphone. www.circleblack.com



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