

DIGITAL ADVICE

Custom Managed Platform Co-developed with Fidelity

Manage digital and fully advised clients side-by-side through a planning-led solution.

Provide clients with a streamlined, digital experience, with straight-through account opening and funding through Fidelity's brokerage capabilities.

Fully Integrated



Flexible

Empower clients to drive the planning process through engaging, self-guided tools while you control key risk and investment criteria.



Attract and prepare for prospects with emerging wealth through a modern experience for tech savvy investors.

*e*Money

A Planning-led, Custom Built Solution for Firms and Advisors

1. ENGAGE

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	Create an in	vestment pl	an to achiev	e your goals	
	tailored to your needs		you succeed. Do it a		
	To start your invest	tment plan, we just n	eed to know a couple	e things about you:	
	How old are	you?	What is your current income?		
	Age		s Income		
		Get St	arted 🛛		
		Next	steps		
	0	2	3		
	Choose a goal to see where you stand and identify a strategy to improve	Assess your risk profile and choose a portfolio that best meets your needs	Open and fund an investment account to start achieving your goals today	Monitor and track your path to financial success	

- · White label the Client Portal.
- Enable clients to complete the on-boarding process quickly.

3. FUND / INVEST



- · Provide a clear and easy path to fund the plan.
- Enable clients to open accounts online, transfer assets, and use electronic fund transfers.

2. PROFILE/PLAN

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	Strategy Recommenda	ation 🔆 Retirement	
	Based on your s	You scored Moderate-Aggressive core, we are recommending the Growth (70% stocks) portfolio.	
		Estimated Future Value	
	Which type of account would you like to open? 0 Tax-deferred (an IRA)	550	
	Taxable (Individual or Joint) How much are you investing?	540.	
	\$5,000 miimum	559	
	$\bigcirc \longrightarrow \frown $	100	
	How much will you add each month?	510k 50	
	s ³⁰⁰	2017 2018 2019 2020 2021 2022 2023 2024 2025 2026	
		Growth Portfolio Breakdown	
	Domestic Stoc	* 28%	

- Configure the risk tolerance questionnaire and assign risk scores to models.
- Allow clients to easily aggregate accounts, start planning, and vary inputs to assess potential impacts.

4. MANAGE

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Welcome	and Stephanie Fox	ι.	
Accounts	+ Add Accounts	Net Worth \$406,066 as of today	Investments
Cash	\$19,682 ^	• \$4,700 • \$4,700 this month since Dec 2014	• \$4,700 • \$4,700 this month since Dec 2014
Wells Fargo Checking	\$9,841 As of 08/05/2016 at 10:45PM		
Wells Fargo Savings	\$3,567 As of 08/05/2016 at 10:45PM	Goals as of today	View All
PNC Joint Savings Ac	\$6,274 As of 08/05/2016 at 10:45PM	Current Savings Likely Savings	Overall probability of success 86%
Credit Cards	-\$3,850 ^	Retirement - 2031 Current savings \$117,38	2 Total needed \$1,700,000
Capital One Quicksil	-\$2,050 As of 08/05/2016 at 10:45PM		
American Express	-\$1,800 As of 08/05/2016 at 10:45PM	Spending this month	View All

- · Receive alerts on key client activity.
- Automate rebalancing and fee billing.

Contact us at 888-362-8482 for more information.