

We can help accelerate your growth with flexible outsourced solutions that include robust investment management.



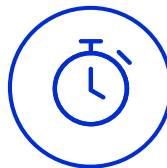
The intelliflo managed difference

Maximize the potential benefits of a flexible outsourced platform with intelliflo managed. Our experienced team can help you construct and implement your own models as well as over 150 others.



Flexible service

We offer flexible options to help you serve your client's unique needs.



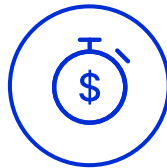
More time

By outsourcing key functions, you spend more time on what matters most: your clients.



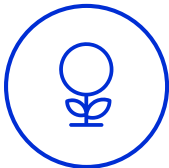
Support at every stage

Experienced and specialized, our team can help you navigate the many complexities of running your business.



Cost & efficiency

Hire more people? Buy more technology? Outsourcing can often be a more efficient and less costly solution.



Robust investment management

Bring your investment research to your clients efficiently or access our 150+ models.



Smoother business operations

Ensure business continuity and manage resource redundancy.

Our flexible services can help you with some or all of:

Investment management

- ✓ Model access and maintenance
- ✓ Account restriction rules and order management execution
- ✓ Continuous rebalancing
- ✓ Tax loss harvesting

Custodial management

- ✓ Access to more custodians
- ✓ Your relationships, ours, or both
- ✓ Multi-custodian trade execution
- ✓ Unified advisor/client experience

Back-office support

- ✓ New account processing
- ✓ Account maintenance servicing
- ✓ Cashiering administration
- ✓ Service portal with digital forms
- ✓ Portfolio reporting

Billing

- ✓ Multiple billing methods
- ✓ Revenue management
- ✓ Deposit and withdrawal invoicing
- ✓ Direct fee debiting
- ✓ Branded invoices to client portal

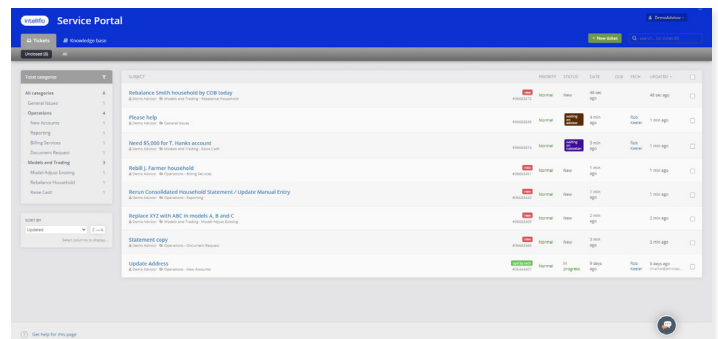
All delivered on top of intelliflo’s turnkey technology platform

How are we able to offer and scale these services with such a highly-personalized touch? We utilize intelliflo’s technology platform which powers the advisory experience globally for over:

- 2,500 firms
- 30,000 advisors
- 3 million end investors
- Over \$1 trillion in assets under advice serviced on our platform*

*as of 3/31/21

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intelliflo Advisers, Inc., (the legal entity we operate under and formerly known as Jemstep, Inc.) has been an SEC registered RIA since 2008. Invesco models are offered through Invesco Advisers, Inc.

intelliflo does not offer tax advice. Please consult your tax adviser for information regarding your own personal tax situation.