

Enjoy all the benefits and flexibility of outsourced services

- at zero platform fees when using select managed models*

Investment solutions for your clients. A more efficient, profitable practice for you.

An innovative, open-source solution enabling you to utilize a wide range of managed models* (as well as your own) – while intelliflo advisers handles the trading, rebalancing, reporting, billing and more on your behalf. For client assets allocated to managed models*, you'll enjoy all these services at no cost.





More time

We handle those lowervalue middle and back office functions so you spend more time on the client-facing activities that matter most



Bespoke service

No automated phone lines or impersonal call centers. Just a dedicated support team to help you and your business succeed



Deep expertise

Averaging 15+ years supporting RIAs, our team can help you navigate the many complexities of running your business



in partnership with





Global expertise

\$83.7B Solutions team with 75+ professionals backed by the strength of Invesco: a \$1.5T global asset management firm



Disciplined process

Capital market assumptions for 170+ asset classes alongside a rigorous manager selection process



Multiple asset classes and constructs

Passive, active, hybrid, smart beta and tax-aware solutions utilizing mutual funds, ETFs and separately managed accounts



Lower costs

Hire more people?
Buy more technology?
Outsourcing can often be
a more efficient and costeffective solution

Delivered on top of intelliflo's turnkey technology platform

A global SaaS platform powering the advisory experience for over 2,500 firms, 30,000 advisors, 3 million investors and \$1 trillion in platform assets (as of 6/30/2021).



Managed models overview

Compared to the typical TAMP offering, our solution offers the potential to meaningfully improve your RIA's profitability.

Typical TAMP offering advisor technology + outsourced services

+ overlay management

+ 3rd party models

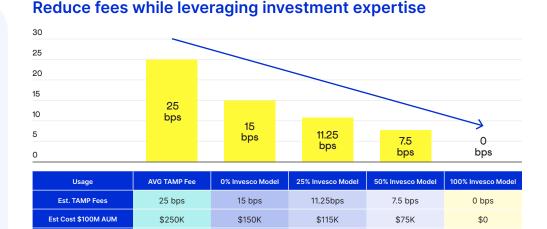
Costs you 20 to 35 bps

Invesco models

intelliflo technology

- + intelliflo managed services
- + managed models*

No cost to you



\$100K

% Managed model*

\$135K

\$175K

\$250K

How it works

Select models - then spend more time on higher-value activities as we handle all the middle and back office services on your behalf. For assets allocated to managed models*, there's no cost for these services.

\$0K

% Non managed model*

Potential savings

AVG 3rd TAMP fee

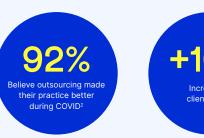


Potential benefits of using models

Advisors using models tend to enjoy more productive practices with improved client, AUM and revenue growth.

1 Fidelity Financial Advisor Community Survey (2018)

2 Blackrock Advisor Survey (2020)







Ready to achieve new levels of efficiency & productivity?

Provide better client service at a lower cost while unlocking the benefits of models and outsourced services. To schedule a demo and learn more, please contact us at sales@intellifloadvisers.com or 1-800-607-3340

*managed models in partnership with ___ Invesco