

intelliflo managed

Outsourced services
for financial advisors
→ of all sizes

intelliflo.com

For Registered Investment Advisors use only.

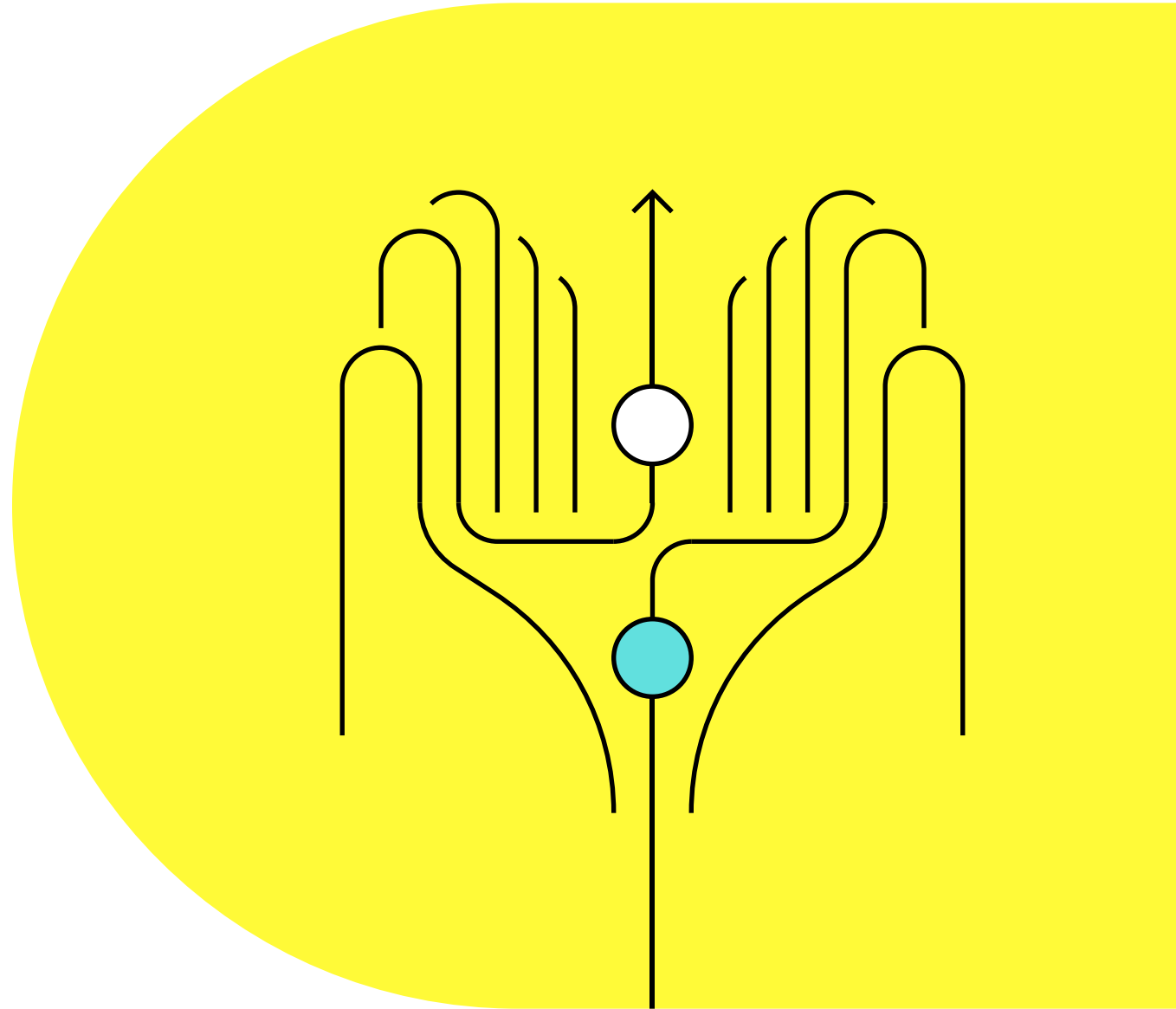


What is intelliflo managed?

We designed a suite of outsourced solutions that you can customize to fit your exact needs.

We know not all firms are the same, so why pay for services you don't need?

With intelliflo, you have the flexibility to choose what works for you.





Helping you break down your barriers to **success**

Managing a business is a full-time job.
But so is being there for your clients.

If you have goals to grow or maintain your firm size, it can be difficult to figure out who you need to hire or what technology you need to buy to meet those goals.

What if you didn't have to do either? While there are times both approaches make sense, outsourcing can often be a more efficient and less costly solution that has the potential to free up your time to spend on what matters most: your clients.

Let's be honest, it's the client facing activities that matter most. Offloading those non-client facing responsibilities like investment management can provide potential benefits for you and your clients.

What's in it **for you?**

Free up more time

Finding more time IS possible when you outsource key functions to a trusted partner.

Your value is in defining goals, growing wealth and preserving legacies for your clients – not filling out paperwork, running reports, rebalancing portfolios and generating invoices.

By outsourcing those non-revenue generating services to us, you actually CAN create more time to focus on the client-facing activities that matter most.

Access to experts

We want your business to meet your goals as much as you do, that's why you'll work with an experienced team to configure and execute a tailored solution just for you.

Our team members have years of experience in helping clients like you meet your goals.

Flexibility

In addition to only using and paying for the services you need, we offer three options of investment models.

Choose from our extensive range of model portfolios at *low platform fees, use your own existing models on our flexible platform, or combine our models with yours.

*Invesco models are offered through Invesco Advisers, Inc.

Flexible services designed for you

We can help with some or all of:



Investment management

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



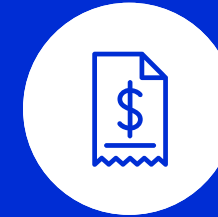
Custodial management

- 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

Making the complex simple

Did we mention that our investment management capabilities are delivered on top of our award-winning* turnkey technology platform, **intelliflo redblack**?

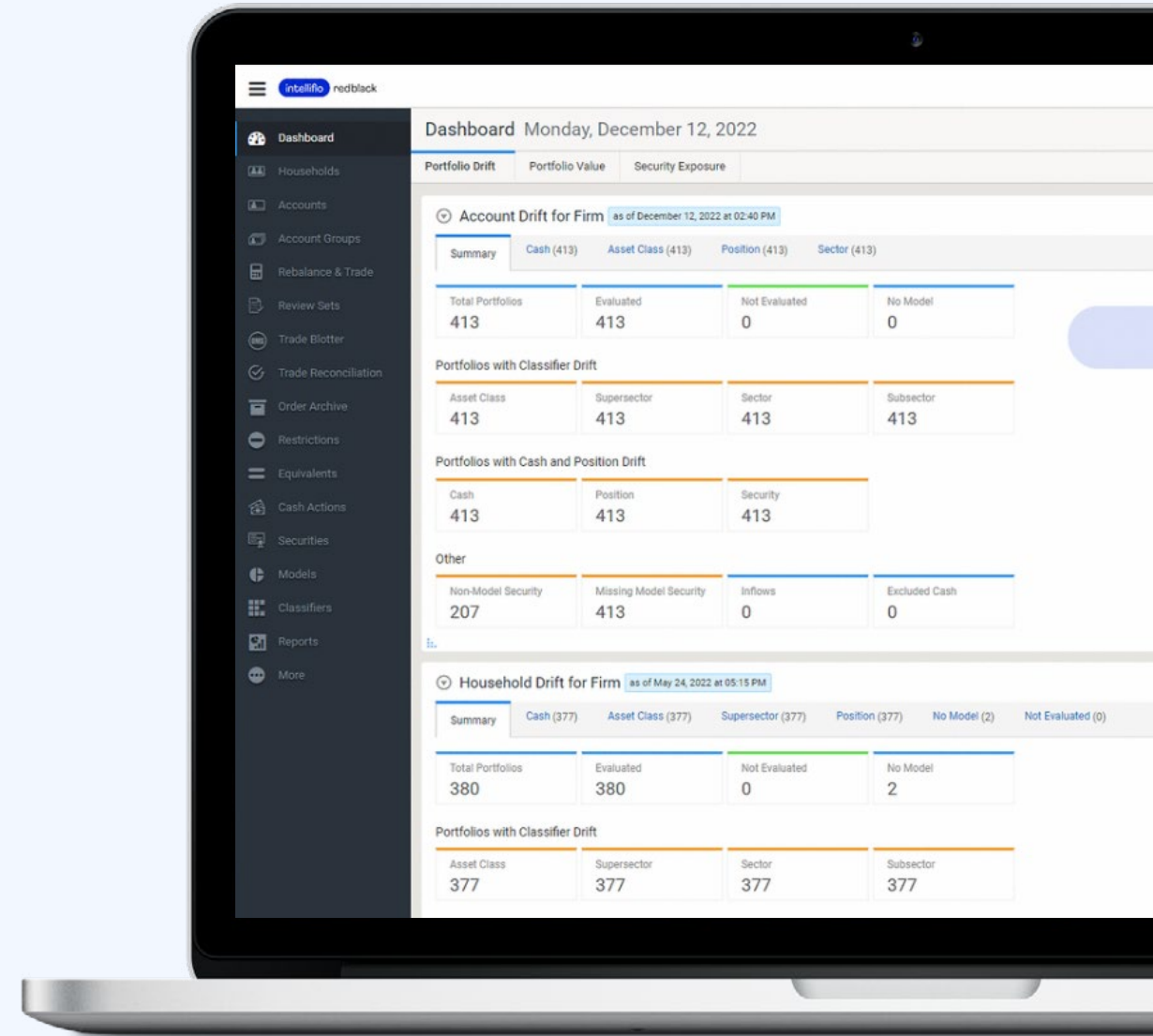
This flexible solution helps provide comprehensive rebalancing and trading capabilities with portfolio management and order management. When choosing intelliflo managed, our experts use intelliflo redblack to power your trading and rebalancing.

→ **All the potential benefits**, none of the work.

intelliflo redblack is an indirect, wholly owned subsidiary of Invesco Ltd.

*WealthManagement.com 2022 Industry Awards Winner for Cloud-based Multi-custodian Rebalancing and Trading Solution.

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Countdown to **success**

Enjoy all the freedom and potential benefits that outsourcing brings.

1. **Book a discovery call** through our demo request page.
2. We'll set up a call with one of our experts to understand **your unique goals and needs.**
3. Once we've answered all of your questions and settled on a **customized solution for you**, we'll get you onboarded quickly and seamlessly.
4. Our consultative and understanding experts partner with you as a **dedicated member of your team.**



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Book a discovery call today

Learn if intelliflo managed is right for you.

[Click here to book today](#)

intelliflo does not offer tax advice.

Please consult your tax advisor for information regarding your own tax situation.

intelliflo Advisers Inc., (the legal entity we operate under and formerly known as Jemstep, Inc.)

has been an SEC registered RIA since 2008.

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