INTELLIFLO ADVISERS INC.

Bryan Perryman
CEO

No two RIAs are the same, and we enjoy working with our partners to find the right solution to their needs. We believe in successful and productive relationships in which we are fully aligned with your business to achieve your goals.

Sometimes, smaller RIAs can be ignored and neglected by larger TAMPs. We hear a lot of dissatisfaction concerning cost and service levels. Our service levels and our approach to investing and partnering with our customers for long-term success are among our biggest strengths.

Given market growth against the broader backdrop of outsourcing, we're speaking to more firms that want to reduce cost and distractions of non-client-facing activities. Further, they are finding it increasingly difficult to attract quality employees, and the cost to train and keep these employees is growing.

intelliflo Advisers Inc. • 1331 Spring Street NW, Suite 2500, Atlanta, GA 30309 • www.intelliflo.com

At **intelliflo Advisers Inc.**, we are dedicated to partnering with you and understanding your unique needs so you can achieve your goals. We have over a decade of experience working closely with RIAs and see ourselves as an extension of your team by providing innovative, efficient and cost-effective solutions.

We understand that entrepreneurial RIAs face the challenge of balancing business management and growth with maintaining a focus on what you got into this business for in the first place—your clients. Through collaboration with our sister company, intelliflo, we help accelerate your growth with solutions including robust investment management capabilities.

Balancing these needs is a real challenge. Here's how we help you succeed:

- **White-glove service**—We have a dedicated support team to help you solve challenges and grow your business. We're part of your team, not just another service provider.
- **Reduce the resources needed to run your business**—We handle those lower-value middle- and back-office functions. You spend more time on the client-facing activities that matter most.
- **Deep expertise**—Our teams average 10+ years of experience supporting advisors like you and can help you navigate the many complexities of running your business.
- **Robust capabilities**—Our range of features and functionality, including model portfolios, tax capabilities, client experience tools and more, helps you stand out in a crowded market and continuously exceed client expectations.
- **Cost and efficiency**—Our platform is a more efficient and less costly solution than hiring more people or buying and learning more technology.

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

Models are offered through Invesco Advisers, Inc.

For Registered Investment Advisors use only.

STRATEGIC FEATURES

- ACCOUNT AGGREGATION
- ACCOUNT REBALANCING
- CLIENT-FACING PERFORMANCE REVIEWS
- CLIENT PORTAL
- CUSTODIAN AGNOSTIC
- CUSTOMIZED PORTFOLIOS
- INSTITUTIONAL CLIENT SUPPORT
- INTEGRATION WITH 3RD-PARTY PLATFORMS
- MODEL MARKETPLACE
- PRIVATE LABELING
- TAX-LOSS HARVESTING
- UNIFIED OR SMART BILLING

New business contact:
Phone: 1(800) 970-9080
Email: sales@intelliflo.com

CONTACT

KEY TAMP PERSONNEL

CLICK IMAGE TO LEARN MORE

Rob Keeler
Head of Operations and Trading

Type of Program: Advisor-Constructed Models, Advisor-Directed ETF, ETF, Managed Account Solutions, Model Manager, Mutual Fund Portfolios, Open Architecture, Rep as Portfolio Manager, Risk Managed Portfolios, SMA, Strategist, TAMP, Third-Party Sub Advisors, UMA/UMH

Year Program Began: 2008

Managers on Platform Vetted: Yes

Managers GIPS® Compliant: Yes

Types of Products Available: Mutual fund and ETF models; proprietary mutual funds; equity SMAs; fixed-income SMAs; ESG, tax-sensitive, target-risk and goals-based strategies; advisor-directed UMAs/multistrategy accounts

Platform Tracks Client Holdings: Yes

Program Compatible for: Multiple advisory channels including RIAs, Corporate RIAs, IARs, IBDs, Bank BDs and Insurance

Optimized for Tax Trading Efficiency: Yes

Sleeve-Level Reporting: No

Program Links to a Trade Execution or Order Management System: Yes

Proposal / IPS: No

Asset Allocation Methodologies: Reporting on asset allocation is by asset class, region, or by sub asset class