



## Embrace tomorrow: unlocking success for financial advisors through technology —————>

In the fast-evolving landscape of financial advisory, staying ahead is not just a choice – it's a necessity. We understand the challenges you face daily in juggling various responsibilities, from acquiring new clients to ensuring compliance and managing your team. That's why we believe in not just addressing these challenges but in transforming them into opportunities for growth and success.

## The current landscape

Did you know that 50% of advisory clients feel their primary wealth manager should enhance their digital capabilities? Meanwhile, there has been a 60% surge in investors comfortable with digital-only models since 2018.<sup>1</sup> It's evident – digital client communications and the delivery of advice are redefining the industry's growth models.

### Your challenges, our mission

We recognize the intricacies of your role and the pressing need for efficiency. Research indicates that RIAs face challenges such as:

- Insufficient time
- Inadequate training
- Compliance restrictions
- Tool integration gaps, and limited application access

**It's time to overcome these hurdles and unlock your technology potential.**

<sup>1</sup>“US wealth management: A growth agenda for the coming decade,” McKinsey & Company, February X, 2022

## intelliflo's tailored solutions

Our stand-alone solutions are designed to streamline, automate, and enhance your current processes while ensuring compliance remains a top priority. Here's how we make it happen:

### Making the complex simple

- Automated operational tasks, including seamless client onboarding
- Rebalancing and trading capabilities tailored to your unique needs

### Open and integrated

- Real-time integration to simplify your daily tasks
- Seamless system connectivity across your workflow
- Tools that provide clients with an intuitive and cohesive digital experience

### Intelligence in action

- Holistic data for comprehensive financial planning services
- Data aggregation to offer your clients complete views of their financial lives
- Intelligent, consolidated, and efficient performance reporting
- Real-time compliance and restriction validation



## Your time to lead

Now is the time to take charge, embrace technology, and propel your practice to new heights. intelliflo is here to be your partner in this journey, empowering you to increase efficiency, enhance the client experience, and drive revenue.

## Let's connect

Ready to revolutionize your advisory practice? Speak with our team to explore how intelliflo's solutions can be tailor-fit to your needs and goals.

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