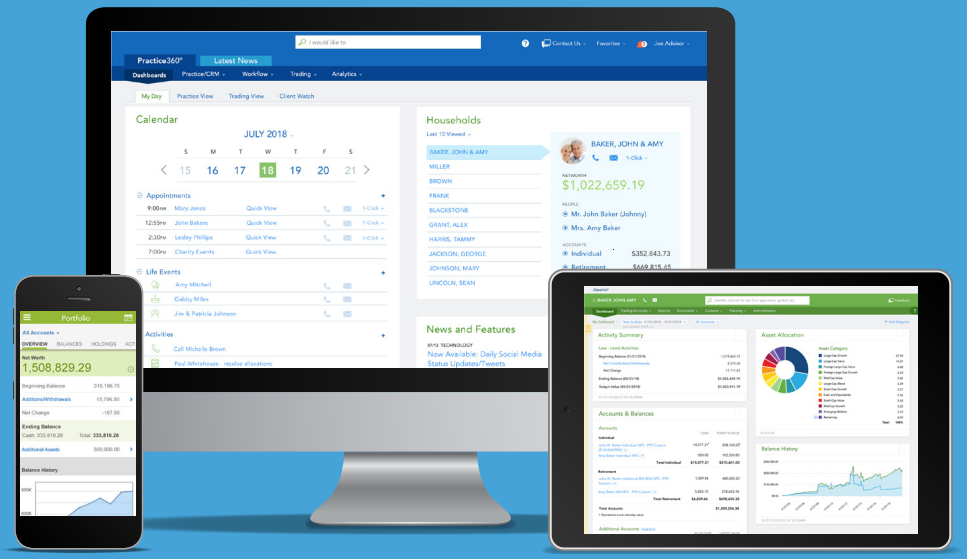
Advisor360°

The only unified financial advisor software suite that **powers your entire business.**



We're not your typical fintech company.

Advisor360°® was born out of tens of thousands of pieces of feedback received during the past 20 years from the industry's highest-producing financial advisors.

Our software is second to none in creating operational efficiencies. Unifying all the systems advisors need to run their businesses into three core tools, Advisor360°'s easy-to-use interface will reduce the burden on your teams and your advisors.

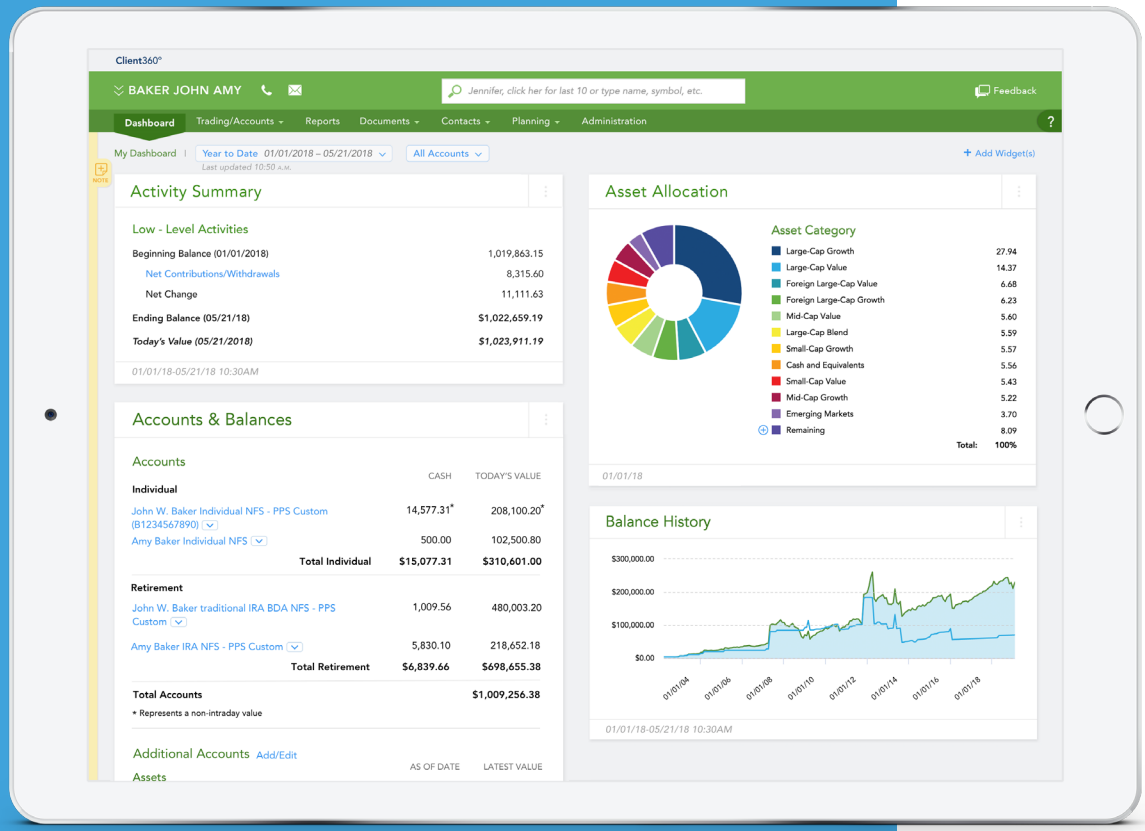
Advisor360°

CORE TOOLS

Client360°®	Provides a comprehensive view of each client's financial life/household
Practice360°®	Brings together everything advisors need for streamlined operations and practice management
Investor360°®	Powers the online client experience, customized by the advisor

Holistic Client Management

Client360° integrates portfolio, trade, contact, document, and wealth management in a single, intuitive platform, giving advisors a truly comprehensive view of each client's financial life.



Dashboard

Our intuitive client dashboard is easily customized, allowing you to display the information you want to see. Manage accounts, execute trades, see performance, open accounts, track goals, run report bundles, move money, and log CRM notes, all from a single page.

Not *just* performance reporting

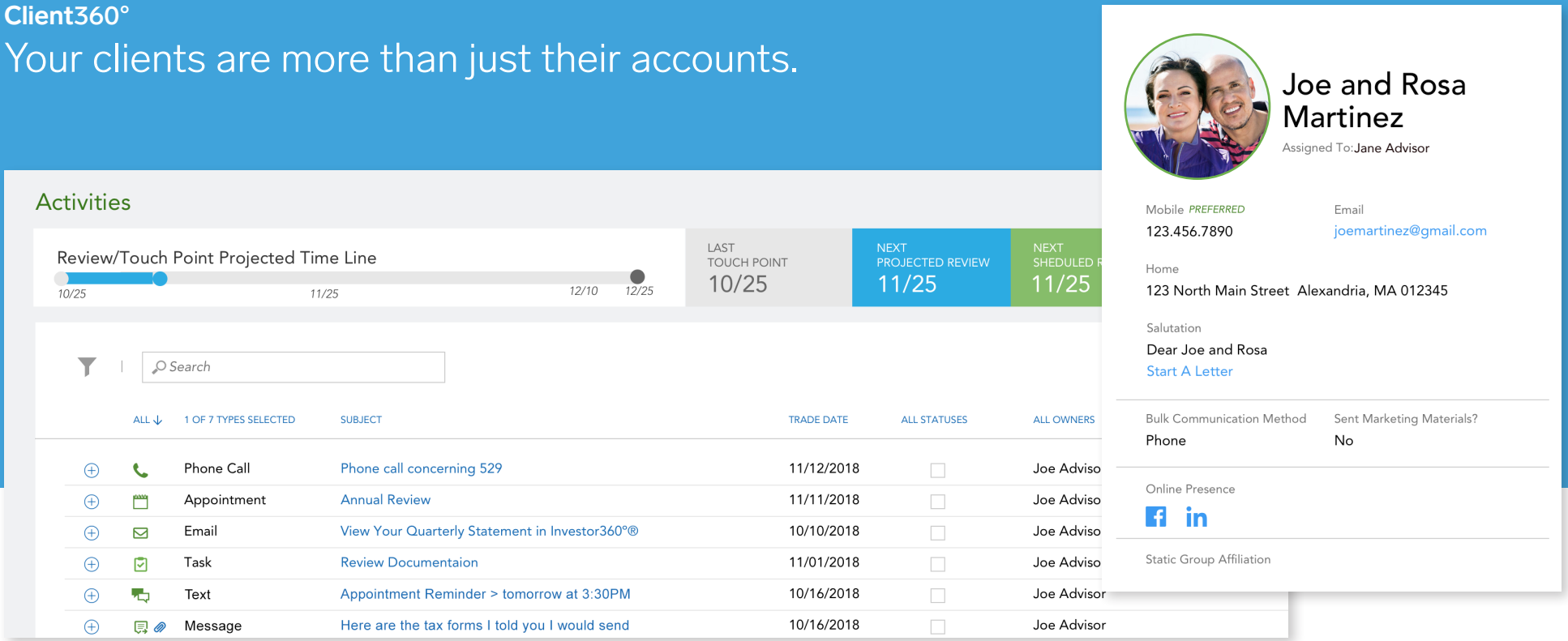
Show clients their investment performance, attribution, and planning information in an intuitive format. Combine reports from different categories into 1-Click Review® packets, with an almost infinite combination of possibilities, all with a single click.

Account consolidation

We scrub the data so you don't have to. Our reporting, including net worth statements, picks up all client assets, whether managed by you or not. Plus, see performance on any account you manage, including variable annuities and alternative investments, regardless of the custodian.

Client360°

Your clients are more than just their accounts.



CRM

Store and monitor important non-financial client information for a household—such as upcoming appointments, tasks, and notes from past meetings—and share it across your office. Our platform auto-tracks emails and text messages and syncs client data and activities in real time with Outlook and mobile devices.

Document vault

Upload all your documents with drag-and-drop ease and embrace a truly paperless office. Our integrated web-based document management system meets SEC and FINRA guidelines and provides unlimited storage space. Easily and securely share documents with clients via Investor360°.

Planning tools

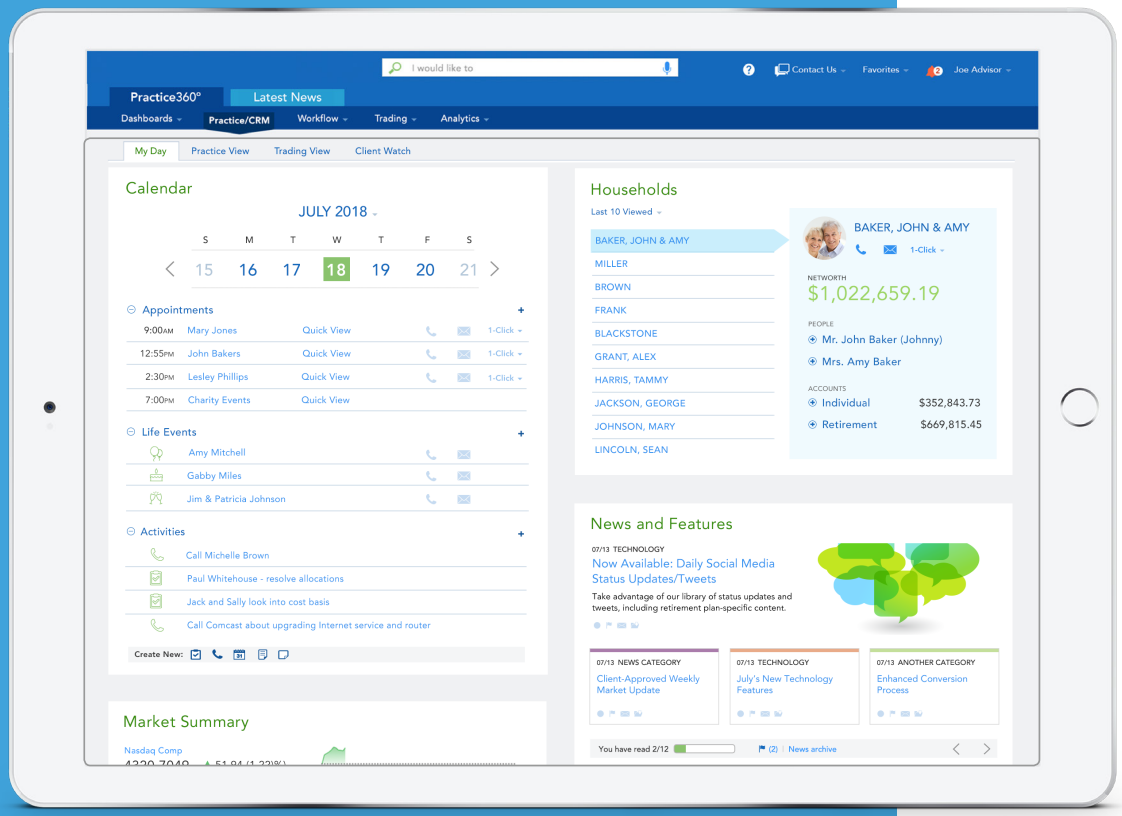
Take a holistic, personalized, and scalable approach to managing clients' financial lives—with quick and easy ways to show them where they are in relation to their goals, review insurance coverage, facilitate more productive planning conversations with WealthGuide®, and ultimately build stronger relationships.

Integrations

While we offer unparalleled informational and operational integrations within Client360°, we also offer integrations with third-party software, such as RightCapital, MoneyGuidePro, Morningstar Advisor Workstation, Wealthscape, Argus, and Thomson Reuters, to name a few.

The Pinnacle of Office Productivity

Practice360° provides unified tools for your entire practice—integrating all practice-wide data, operations, and workflow into a single, powerful dashboard.



Management reports

Global practice reporting capabilities give you the flexibility to create an almost infinite number of customizable management reports, for your entire book of business or any custom subset, including holdings, client revenue, asset allocation, and performance.

Office workflow

Integrated dashboard widgets allow you to see what's being worked on across your entire business. Work in Progress, Work Completed, and Follow-Up Required buckets are updated in real-time across hundreds of different work types, allowing you and others in your business to have full transparency on where both back office and your business work items stand.

Alerts

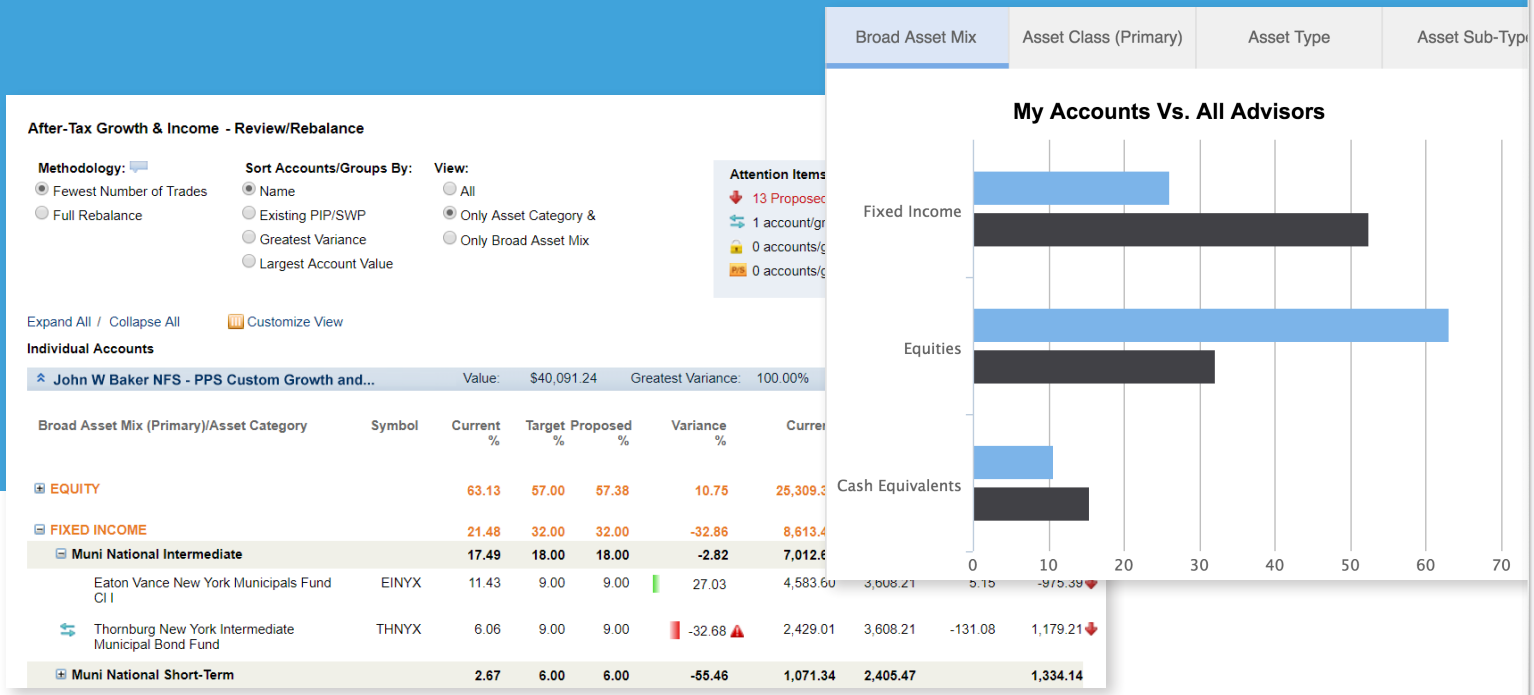
Customize practice-level alerts that dynamically monitor behind-the-scenes data across 70+ different workflows, including items such as model drift alerts, low cash balances, overdue review schedules, bond calls, and GTC expiring orders. You can choose who in your office gets alerted and how, so the appropriate person can act upon relevant triggers and changes in your practice and to client accounts.

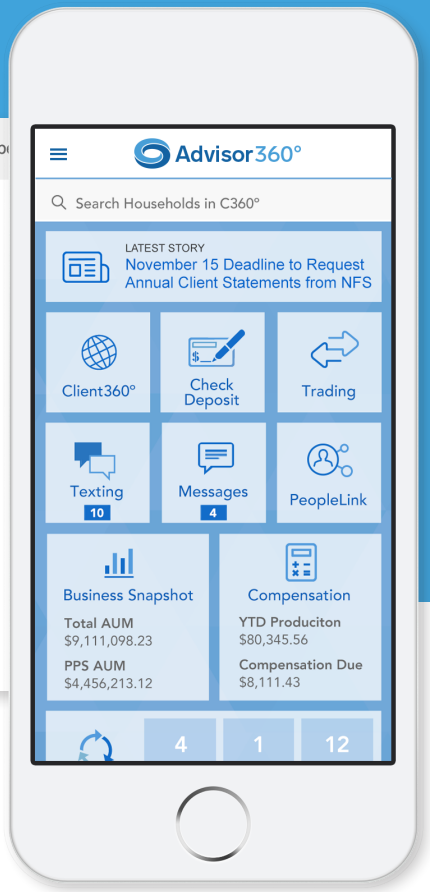
Groups

Create static and dynamic groups of specific households, clients, or accounts and leverage those groups in systems such as Trading, Rebalancing, Reporting, or CRM Mail Merge, joining together investment, CRM, and planning data from Client360°.

Practice360°

Streamlined operations





Rebalancing/bulk trading

Practice360° Models streamlines investment management, making the time-intensive process of creating, assigning, and rebalancing multiple portfolios as easy as point-and-click. Create model portfolios from scratch, a template, a model, or an account's holdings—and assign an unlimited number of households or accounts to each one. Establish drift tolerances at the position or model level, lock positions, set up equivalencies, and create cash buffers.

1-Click Review widget

Prepare for a whole week's worth of client reviews with a single click. You can run bundles of favorite reports across multiple clients at once. Generate comprehensive reporting packets, collated by household, via ad hoc search, for practice-level groups, or by having the system look inside each advisor's calendar to see upcoming meetings over a specified time frame.

Analytics

Compare your practice with others using our intelligent analytics. Analyze allocation, account performance, business performance, and growth trends to make more informed business decisions.

Mobile

Our responsive tools allow you to stay connected to your business and clients even when you are on the go. From your smartphone or tablet, place a trade, move money, confirm an ACAT, receive alerts, review your compensation, and more. Download our Apple or Android apps for even more functionality, such as the ability to deposit a check or send secure messages and texts to clients.

Complete Visibility for Clients

Investor360° lets you give clients online access to as much or as little of the information you see in Client360° as you'd like, including performance, gain/loss information, and advanced reports.

Accounts & Balances

Accounts

	CASH	TODAY'S VALUE
Individual		
John W. Baker Individual NFS - PPS Custom (B1234567890)	14,577.31*	208,100.20*
Amy Baker Individual NFS	500.00	102,500.80
Total Individual	**$15,077.31**	**$310,601.00**
Retirement		
John W. Baker traditional IRA BDA NFS - PPS Custom	1,009.56	480,003.20
Amy Baker IRA NFS - PPS Custom	5,830.10	218,652.18
Total Retirement	**$6,839.66**	**$698,655.38**
Total Accounts		**$1,009,256.38**

* Represents a non-intraday value

Additional Accounts Add/Edit

	AS OF DATE	LATEST VALUE
Assets		
Banking		
John & Amy's Checking Account	12/02/2019	5,006.99
John & Amy's Savings Account	01/02/2019	10,560.34
Real Estate/Property		
Ⓜ Summer Townhouse, 1235 Main Street, Owls Head, Maine	01/02/2019	412,543.00
Primary Residence	01/02/2019	995,345.34

Permission-based access

All clients, a group of clients, or individual clients can get assigned different permissions and functionality based on what you want them to see. Show or don't show performance, gain/loss information, documents, advanced reporting, account aggregation, and more.

Portfolio/performance reporting

Clients can get a truly holistic view of their portfolios, performance, and more, for a complete picture of their financial life. Allow clients to see the group of accounts important to them, the ability to add assets held away, and the same advanced reporting that advisors see.

Account aggregation

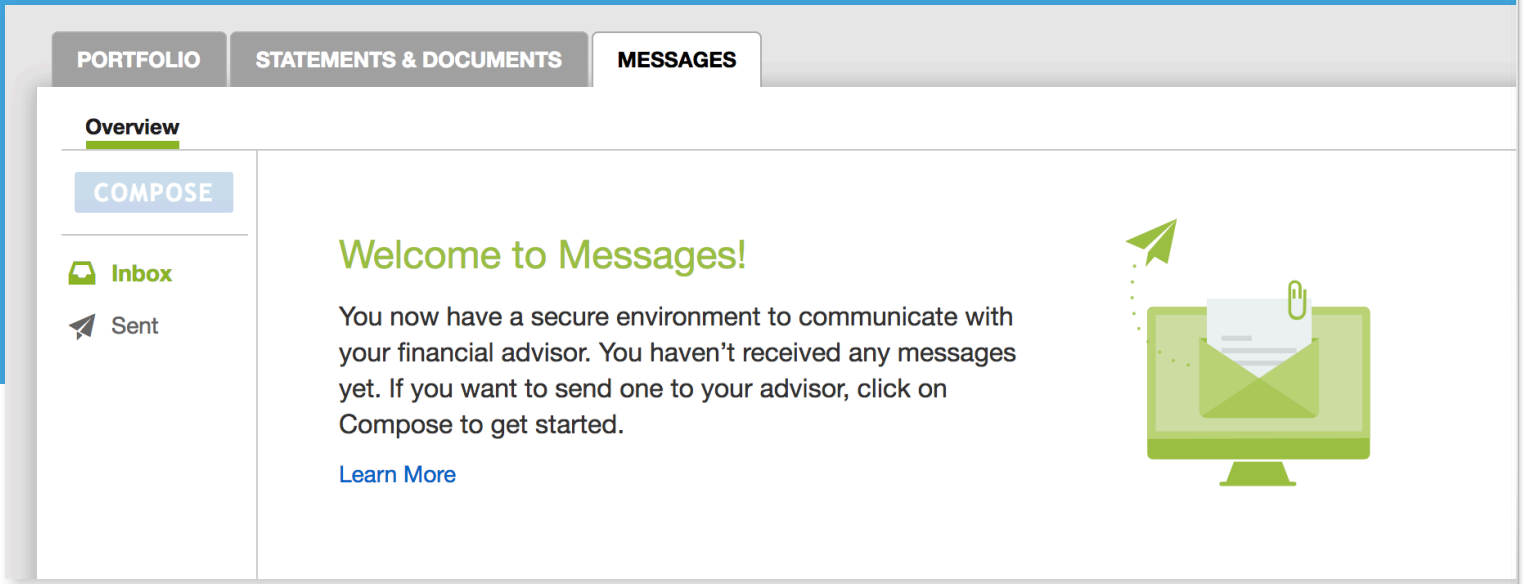
Our partnership with Quovo allows clients to securely link their outside accounts (e.g., bank, loan, credit card) to Investor360°, so those balances and holdings constantly update and flow into the advisor platform for use in reporting and planning tools.

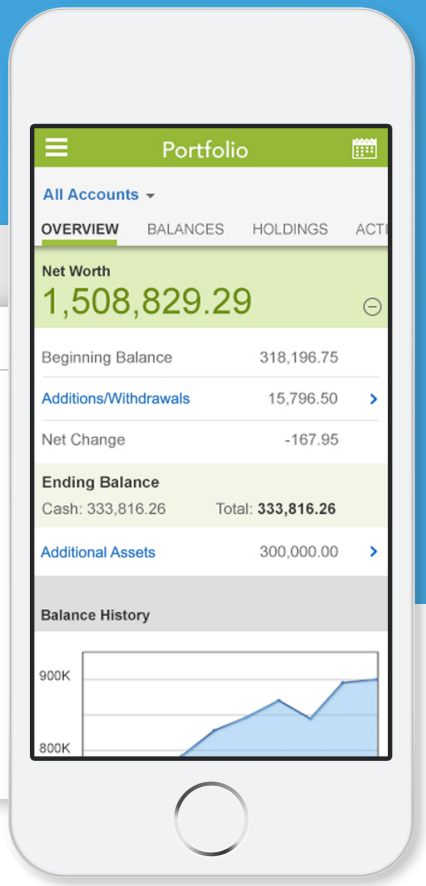
Statements and documents

Allow clients to update paperless preferences as well as download consolidated and brokerage statements. Share documents they can access easily from any device.

Investor360°

Secure and accessible





Secure messaging

Investor360° Messages allows for the secure sharing of messages and documents. Both clients and advisors can send and receive messages from their respective web portals or mobile apps.

Integrations

Clients can take advantage of Investor360°'s integration with Quicken, TurboTax, TaxAct, H&R Block, and Wealthscape Investor for added reporting and simplified tax filing.

Mobile

Our mobile app allows clients to stay connected to their accounts even when they are on the go. Available on both Apple and Android devices.

Advisor360°

- Received the highest satisfaction ratings by financial advisors in industry-leading publications
- Born from feedback from some of the industry's most productive financial advisors
- Industry-leading integration of information with operations
- Unparalleled back-office efficiency
- Browser/operating system/device agnostic

To learn more or schedule a demo, visit **advisor360.com**.

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