The 3 Largest ROIs for Growth-Focused Advisors

Where to invest time, technology, and strategy for the greatest immediate, near-term, and evergreen returns.

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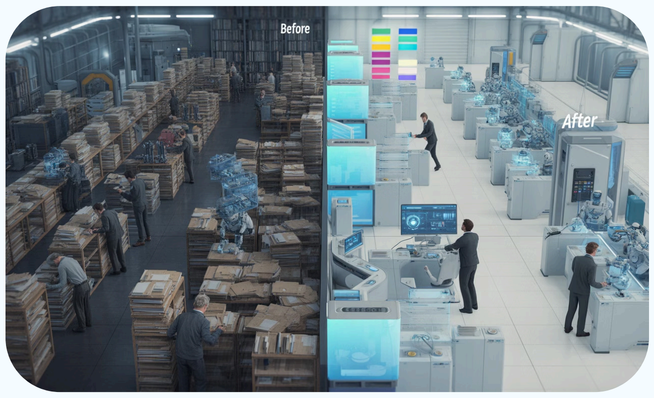
ROI #1: Portfolio Management

Automate a Unified Managed Household approach that delivers:

- **Client Preferences (IPS)**
- **Tax-Optimization**
- **Incorporates all Assets and Accounts**

Immediate ROI



Benefits

Unlock Capacity

Automating complex portfolio trading creates immediate capacity for growth

Competitive Differentiation

Automated tax optimization and loss harvesting enables documented client results

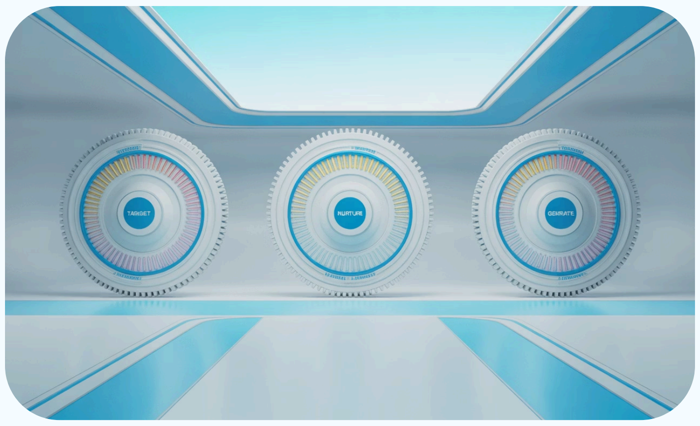
Compliant Customization

Rules-based portfolio construction and implementation enable firm processes and guardrails to be built into the service model while allowing for full personalization

ROI #2: Digital Marketing

Technology makes it easy to create targeted, qualified leads

- Low Lift
- Low Cost
- High Value



3-12 Month Results

Benefits

Target Ideal Client Prospects

AI powered databases provide the right prospects, in the right geography, that have the highest probability of seeking financial advice

Direct Digital Marketing

Technology now allows you to send digital ads to your targets anywhere on the internet, track engagement, and deanonymize visitors to your website

Automated Nurturing

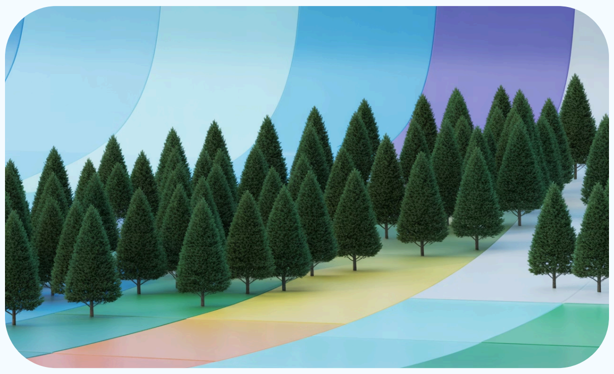
When a prospect engages with your ads, content, or website; the nurturing campaign activates to convert the prospect into a qualified lead that is ready for engagement

ROI #3: Data Infrastructure

Owning the data has critical benefits for growth-focused, innovative firms

- Data Ownership
- Data Integration
- Data Translation

Evergreen ROI



Benefits

Adaptability

Owning the data infrastructure means no more complex migrations or integrations; the data is available to move between legacy software and new technology solutions

Flexibility

Single source, APIs and data translation allow firms to have the right data when they need it and wherever they need it; multi-solution, multi-platform, multi-custodian - no limits

Scale and Growth

Technology is improving exponentially, while tech adoption is linear. Firms that want to establish and maintain a competitive advantage will need to be highly flexible and adaptable across the entire infrastructure to keep pace with innovation and opportunity.

🔚 Ready to Monetize These ROIs?

Learn how leading RIAs are owning these ROIs with Technology, Process, and Infrastructure enhancements.

Discover the strategies and technology that drive growth, scale, and efficiency to create a competitive advantage for modern wealth management firms.

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