

## Technology Platform

Our Fusion Elements Technology provides empowered advisors the end to end support needed to capture your firm's Alpha. Owning your process means less time, less training, less need for support, and more consistency and efficiency, no matter what else changes

We've built the Advisor OS system with technology at its core.



Fusion Elements



Finally, the technology has arrived that works with you, not against you. The Fusion Elements platform is your single portal for all of your firm's operational needs, and the open architecture to allow you to operate the way you want.

Our Fusion Elements Technology removes the timely and costly friction from your everyday operations. Designed to allow advisors to easily serve their existing clients, Elements frees up the time and energy needed to focus their attention on obtaining new ones.

- Audit Support
- New Account Opening/Account Servicing
- CRM Integration
- Transition Support
- Paperless processing and signature capabilities
- Payables to Audit
- Third Party Money Management
- ...Website editor, all client service operations, secure document storage, sales support, reporting, fee billing, compliance oversight, marketing management, account allocation, paperless processing, and anything else you can think of.

**CONTACT US TODAY AT 888-267-4820 TO LEARN HOW  
ADVISOR OS CAN HELP YOU REACH YOUR GOALS**

**ADVISOR OS**  
INVESTMENTS • OPERATIONS • MARKETING

Advisor OS is a fully personalized operating system for growth-mindset advisors seeking a competitive advantage. We provide five distinct, yet integrated elements of service and support that allow advisors to focus on revenue generating activities with the confidence that their unique value proposition is reinforced, enhanced and supported.

DALLAS • CHICAGO  
888-267-4820 P | 866-484-4140 F  
[www.advisor-os.com](http://www.advisor-os.com)

- ONE** An Institutional-Grade Investment Process
- TWO** End To End Office Operations
- THREE** Full Suite of Marketing Capabilities
- FOUR** Best of Breed Fusion Elements Technology
- FIVE** A Vibrant Learning Community