

But what's the alternative?

CURRENTLY,
ADVISORS OF
THIS TYPE HAVE
TWO OPTIONS:

They can select the
traditional TAMP (turnkey
asset management platform)
model to outsource that
complexity while losing
their personalized value
proposition with clients
OR they can simply forgo
growth for survival.

But there is another plan...



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The
Advisor
Operating
System

An overwhelming number of advisors are struggling to get to the next level.

A more complex investment landscape, increasing compliance and regulatory constraints, technology abundance and change, and the lack of a disciplined investment process all conspire against today's advisors; biting into the time needed to focus on strategic business activities.

Ironically, for the best advisors it's the very quality standard that differentiated them in the first place that is now the cause of their frustration; Personalization. Executing on a personalized, top-tier investment program has become so time consuming and complex that it has trapped these high quality advisors.

The Empowered Advisor

There is a group of advisors – traditionally, the top 10% - who have found an alternative path to stagnation and complexity. They are operating alongside the rest of the industry but on an entirely different level and are enjoying an entirely different experience. These advisors enjoy time freedom, industry-defying growth, and a higher quality of life.

We call them Empowered Advisors.

The missing element that Empowered Advisors have and the rest of the industry doesn't have is what we call an Advisor Operating System. An Advisor Operating System is comprised of best of breed technology, a robust suite of marketing solutions, a disciplined and personalized investment process, a complete back and mid-office operations platform, and a vibrant, continuous learning community.

TOP
10%

The Empowered Advisor

Enjoying time freedom, industry-defying growth, and a higher quality of life.

BOTTOM
90%

The Trapped Advisor

They face increased complexity, decreased time freedom and flat-lined growth. They struggle with operational issues, fewer client acquisitions, overwhelming technology options and poor investment performance due to the lack of a disciplined investment process.

ADVISOR **OS**
INVESTMENTS • OPERATIONS • MARKETING

The Advisor Operating System is a complete solutions for today's advisor:

- 1 **ONE**
best of breed Fusion Elements technology
- 2 **TWO**
a disciplined and personalized investment process
- 3 **THREE**
a complete end-to-end operations platform
- 4 **FOUR**
a vibrant, continuous learning community
- 5 **FIVE**
a robust suite of marketing solutions