Advisor Connexion™

(888) 485-3456
Info@FolioInstitutional.com

Advisor Connexion is a robust new capability that can wholly transform your practice and give you the competitive advantage you need to grow your firm in unprecedented ways. This transformative technology seamlessly integrates a new suite of online interactive tools with the existing Folio Institutional brokerage platform and your expertise. With it, you can launch your own web-based advisory service to attract and engage investors who demand anytime/anywhere online service, while improving the way you serve existing clients.

CREATE AN ONLINE, SELF-DIRECTED ADVISED OFFERING TO COMPLEMENT YOUR PRACTICE

COST EFFICIENTLY ADD DIY AND ASSISTED OFFERINGS AND APPEAL TO YOUNGER CLIENT SEGMENTS

ENHANCE SERVICE WITH ONLINE CONVENIENCE AND ACCESS

REDUCE CLIENT SERVICE COSTS TO SERVE MORE ACCOUNTS, REGARDLESS OF SIZE

- **Maintain Full Oversight of Client Accounts:** Continue to provide your own expertise, while automating only the features that make the most sense for your business.
- **Gain Access to New Client Segments:** Deliver a highly personalized experience with significantly fewer resources and less direct service time. Accommodate investors who prefer 24/7 online service or those starting out with lower minimum investments.
- **Extend Your Reach Far Beyond Your Physical Footprint:** Expand to the entire area you are set up to serve—the elimination of geographic barriers and business-hour limitations now make it possible.
- **Streamline Back Office Costs:** Reduce manual account set-up and activation costs and capture client assets more easily.

Advisor Connexion is completely adaptable to how you and your clients want to transact business. Its modular approach allows you to customize a mix of online and in-person advice, and it gives clients the choice of performing tasks and signing forms securely online. Time consuming procedures like account set-up and investor questionnaires can now be done at the client's convenience. You can continue to provide investment recommendations and portfolio adjustments. You can also opt to have portfolio adjustments made automatically, putting client assets to work without delay.

Advisor Connexion can also be used to create a self-directed, advised offering. You can give clients online access to your investment portfolios and even control their investment choices, via a customizable investor questionnaire, while efficiently managing your direct service time.

Key Features

- Customizable, branded web experience
- Modular approach that gives you full control of client accounts
- Option for single-session account opening/investment questionnaire/ account funding
- E-signature capability for required disclosures and agreements
- Investor questionnaire built and delivered online to your specifications
- Automated recommendations for proposed portfolios and firm-specific models
- Option to enable auto-invest for continued asset growth without advisor outreach
- Administrative toolset for controlling client account permission levels, pricing, access settings, custom investor questionnaire and subscription
- Folio platform capabilities such as personalized portfolio allocation, rebalancing, and tax management

Advisor Connexion gives you the ability to quickly adapt to evolving market dynamics, compete effectively, and win against competitors with a powerful online offering of your own.

While the personal advisor/client relationship continues to be a highly valued element of the investor experience, consumers in all sectors have come to expect the convenience of online service. Advisor Connexion provides the best of both.

About Folio

Founded in 2000, FOLIO*fn* Investments, Inc., was the first brokerage firm to offer themes-based, fully-customizable baskets of securities, called Folios (available to retail investors at www.FolioInvesting.com), as well as flat-fee pricing, fractional share, dollar-based investing and other innovations to encourage smarter, diversified investing. Folio also provides a state-of-the art platform for advisors, introducing broker dealers, and securities issuers through www.FolioInstitutional.com that currently services hundreds of firms. That platform allows advisors and others to manage thousands of accounts with a few clicks, service smaller accounts in the same manner as their largest accounts, and fully integrates billing, performance reporting and other services. Beyond advanced brokerage, custody and clearing services, Folio also runs a state-of-the-art web-based private placement and public offering platform available to firms raising capital, and maintains a variety of alternative trading systems for secondary market trading of listed and unlisted securities.

See for yourself. Schedule an online demonstration today.

(888) 485-3456 | Info@FolioInstitutional.com