

# Build a better future one household at a time

Technology is driving change in insurance and will continue to commoditize the product-centric approach to business until it is no longer financially viable.

Advisor360° delivers an integrated wealth management platform to connect all business lines from insurance to retirement and investment. We simplify complex connections between disparate data sources, third-party apps, and workflows.

Advisor360° is relentless in its pursuit of uniting the entire data management life cycle to deliver a deeply integrated platform.

## Our Unified Data Fabric™

Advisor360° offers a first of its kind, differentiated platform that does not rely on cobbling together various interfaces to deliver an adequate experience. Instead of simply visually uniting data on a screen, Advisor360° has taken a different approach and functionally united data to deliver a consistent story across various applications and through the full spectrum of financial support.

Data in Advisor360° (from external data feeds ingested daily to third-party integrations and platform calculations) is unified, organized, and automatically structured by household in a single view. Platform data is consistent across reporting suites, enabling agents to quickly assess and respond to the state of their client's portfolio and deliver services in the way the customer needs—enabling a true omni-service experience.

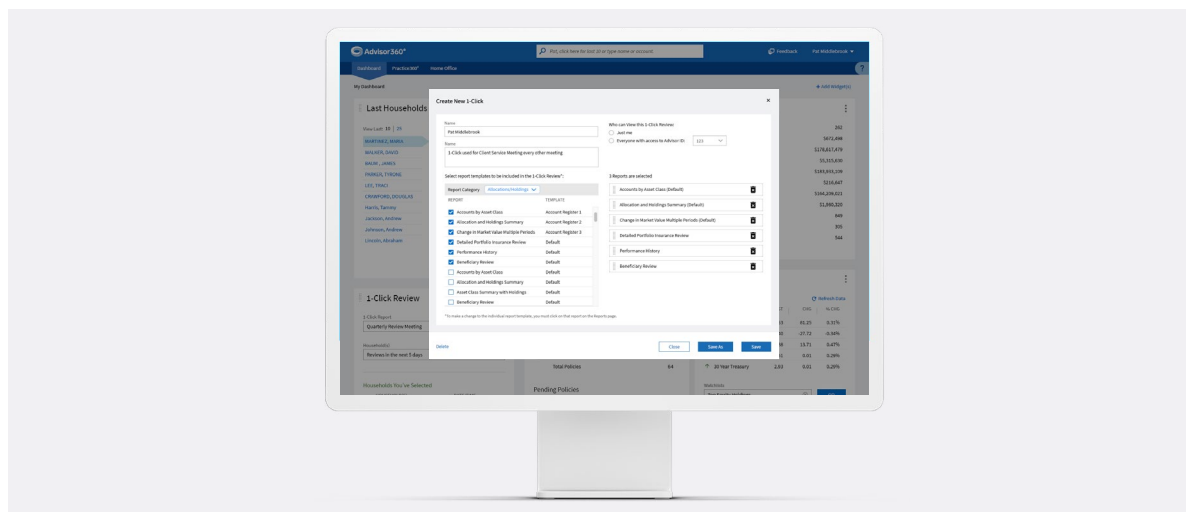
## Help insurance agents be more efficient

It can take agents 5 or more hours to prepare for a single client meeting for a household, to name one example.

### With Advisor360°, insurance agents can:

- Bundle favorite reports for clients with a single click
- View pending and existing policies in a single dashboard
- Reduce manual entry of held-away assets

- Automatically group members of a family into a household
- Begin the new business process from our dashboard

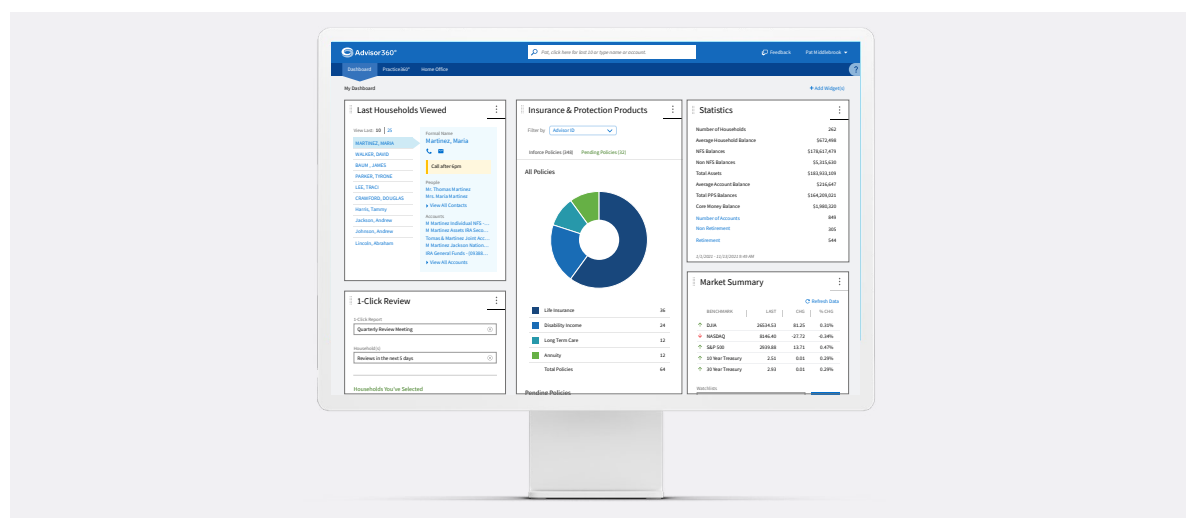


## Improve practice productivity and reduce compliance risk

Too often there is no deep data integration in one platform showing a client's complete financial life, including products offered by others and business in motion.

### With Advisor360°, insurance agents can:

- Reduce toggling between disparate applications
- Bring all product lines together at the practice level, showing agents their total book of business and business in motion
- See what the field is doing to deliver optimal outcomes for clients
- Deliver modern user experiences for clients
- Automate document bundling

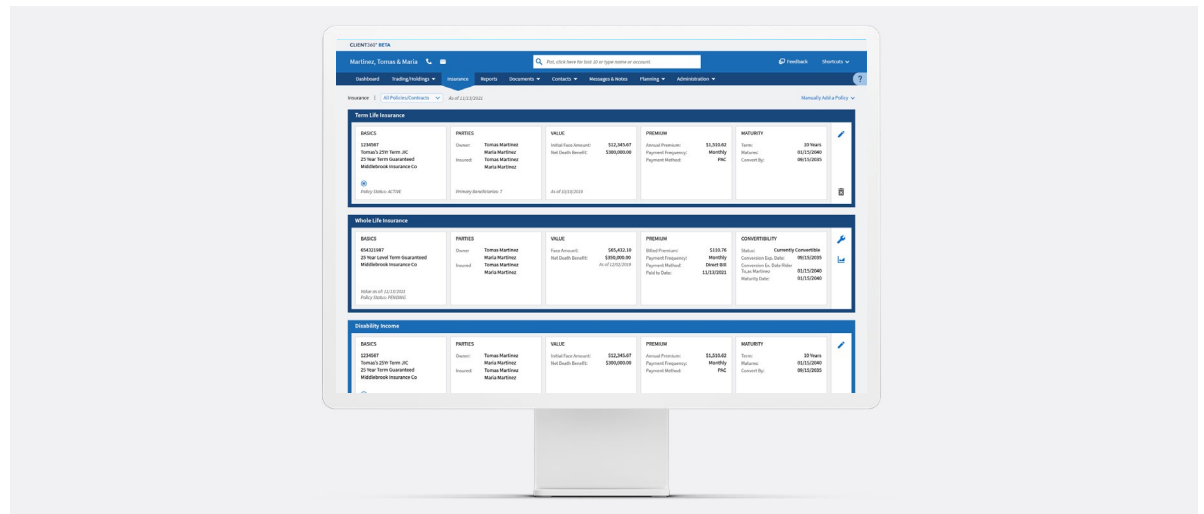


## Increase assets under advisement

Helping top producers grow their business while better serving customers takes commitment in technology.

### With Advisor360°, insurance agents can:

- Unify all business within a household into one cross-product class dashboard
- Initiate seamless digital account openings and approvals
- Easily filter data or use widgets to quickly identify new business opportunities
- Initiate trades with a single MSA on file



## Core components for agents and their customers

- Dashboards/Configurable Widgets
- Client and Performance Reporting
- Digital Onboarding
- Financial Planning/Proposals
- Portfolio Management (Trading/Models/Rebalancing)
- Insurance
- Contact Management
- Alerts/Workflow
- Account/Policy Maintenance
- Business Analytics
- Imaging (Documents)/Document Vault
- Mobile App
- Data Aggregation
- Secured Messaging

- Tax/Finance Integration
- Books and Records
- Advisor Branding
- Real-Time Market Data

## Questions?

To learn more about the Advisor360° platform for insurers, visit [advisor360.com](https://advisor360.com)

To schedule a demo, email [sales@advisor360.com](mailto:sales@advisor360.com) or call (781) 994-1275 ext. 5555.



Advisor360° is a Software as a Service provider that builds and delivers integrated technology for wealth management firms. The company's proprietary Unified Data Fabric™ synthesizes complex and disparate data streams into one platform for a highly sophisticated wealth planning solution. Today, 3 million households representing \$1 trillion in assets benefit from the integrated Advisor360° experience.

To learn more, visit [advisor360.com](https://advisor360.com)