

Increase advisor productivity with our Advisor360° Essentials offering

Give your advisors all the tools and consolidated reporting they need to manage household wealth through our custodian-agnostic portal.

Advisor360° offers a comprehensive view of household wealth in a modern, digital platform that will satisfy even your most discerning advisors.

Our Advisor360° Essentials offering provides a custodian-agnostic advisor portal with all the tools and consolidated reporting your advisors need to manage household wealth, including our industry-leading 1-Click Reviews®.

Unified Data Fabric™

Our Unified Data Fabric is the foundation of our platform—cleaning, normalizing, and enriching data from hundreds of sources.

Essentials	Extended	Enterprise
<p>Our core Advisor360° Essentials offering includes:</p> <ul style="list-style-type: none"> • Unified Data Fabric™ • Advisor portal (includes insurance; 1-Click Review® reports; practice-level analytics; document vault) • Third-party software integrations 	<p>Everything in Advisor360° Essentials, plus:</p> <ul style="list-style-type: none"> • Deeper advisor experience (proposal creation; trading; model management /rebalancing; analytics) • Client portal with digital engagement tools (includes compliant text messaging and account aggregation) • Home office trading workflow • Quicken®/TurboTax®/H&R Block®/TaxAct® integrations 	<p>Everything in Advisor360° Extended, plus:</p> <ul style="list-style-type: none"> • Deepest advisor experience with digital onboarding and fee billing • Enterprise workflow system • Imaging • Account maintenance tools • Compliance management

With Advisor360° Essentials, you'll get:

- **Unified Data Fabric (UDF):** Access wealth data that's integrated and woven together seamlessly from hundreds of financial and wealth sources: any financial account, real estate, insurance policy, beneficiary information, investment, health savings account, income source, debt, and so on. Learn more: advisor360.com/unified-data-fabric
- **Advisor portal:** Get business-critical tools like portfolio management, financial planning, and performance reporting, as well as our 1-Click Reviews for easier client meeting prep and practice-level analytics.

- **Third-party software integrations:** Our comprehensive partner ecosystem goes well beyond single sign-on, so you can run your business more effectively.

Advisors wake up to a more productive workday

Get the tools to increase your advisors' productivity today, with the flexibility to scale tomorrow.

Help advisors:

- **Report:** Prepare for client meetings more efficiently with 1-Click Reviews, which allow you to schedule and run your favorite reports in minutes.
- **Manage:** Automatically group clients by family households to serve their entire needs more easily.
- **Prospect:** Sort and filter client/prospect data using dozens of attributes to create marketing mailings and other campaigns and notifications.
- **Prepare:** See a household-level dashboard for a complete picture of the family.
- **Advise:** View insurance, investment, and banking products in a single dashboard.
- **Plan:** Get practice-level alerts 90 days prior to term expirations.
- **Document:** Store client documents in a secure document vault within the platform for easy access.

1-Click Review

Our Unified Data Fabric consolidates wealth data from hundreds of sources into one layer and allows your advisors to seamlessly combine investment, insurance, and banking product types into proposals, financial plans, and reports.

The result: reports that used to take hours or days to compile and analyze now take seconds. Advisors can bundle favorite reports with one click, and their clients can receive investment and insurance information under a single cover page.

What's included

- Unified Data Fabric
- Third-party software integrations
- Advisor portal (includes insurance; 1-Click Review reports; practice-level analytics; document vault)

Unstack your tech stack

Advisor360° gives you and your advisors all you need, without more than you need.

Contact us to learn how our platform can help your advisors be more productive.

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DIGITAL EXPERIENCE

WEALTH MANAGEMENT

SOFTWARE INTEGRATIONS

DATA AND ANALYTICS

WORKFLOW

ADVISOR360° RUNDOWN



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