The Optimize Technology Platform

Optimize Wealth Management

Optimize Wealth Management

The Optimize Technology Program

Centralized Access

At Optimize Wealth Management, we believe in harnessing the power of technology to provide our clients with the most efficient, secure, and comprehensive wealth management services. Our state-of-the-art platform is designed to deliver the most robust financial solutions, while seamlessly integrating advanced analytics, AI-driven insights, and user-friendly interfaces.

Discover the comprehensive and multifaceted systems which we have put in place to support your financial journey with us. We pride ourselves on providing the most robust resources in the industry to ensure you have all the tools you need to succeed.

Simplify your Life with our Single-Sign-on access to one centralized hub for all your software needs, eliminating the need for multiple platforms and passwords.

Single Sign-on

Key Components to a Seamless Transition

Optimize Wealth Management

1 Centralized Platform Access

- By centralizing high-end platforms within our CRM, we create a cohesive experience that enables users to leverage advanced capabilities without needing to navigate separate tools.

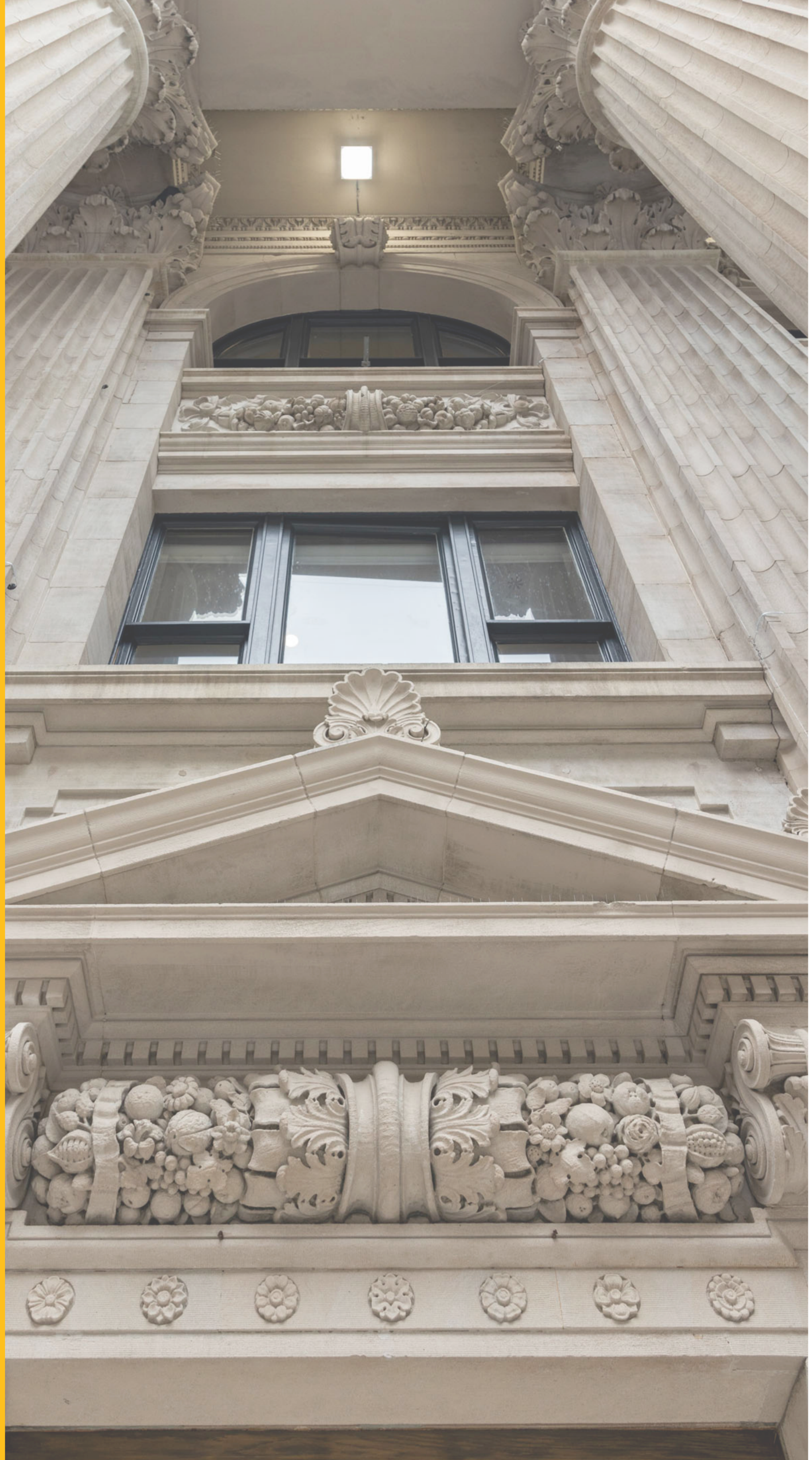
2 Fixated on Strengthening Client Relationships

- Through technology, we enhance personalization and support, ensuring each client receives meaningful, connected service that deepens their relationship with us.

3 Future-Ready Technologies. Always.

- Our technology will constantly evolve with the financial landscape to ensure we remain prepared for the future while upholding the highest standards our clients expect.

Result? With this approach, our Advisors benefit from a powerful, intuitive platform that enables them to work more efficiently and focus on what matters most: **building long-lasting client relationships.**



Optimize Wealth Management

Harness Our Future-Ready Technologies

Fully Integrated Technology

Employ Premium Technologies like DocuSign for Onboarding, Bloomberg for Research and Conquest for Financial Planning, all of which are fully integrated within our industry leading CRM Hubspot.

Industry Leading Tech Stack

We want to ensure that you have constant access to Future-Ready Technologies that are always the industry's Best and Leading Technologies, not yesterday's archaic and clunky systems.

Leverage our carefully curated technology stack which ensures enhanced efficiency and service levels for your clients at every step of the way.

Industry Awards

Increased Efficiency

8.3x

Increased Time Savings

70%

Optimize Wealth Management

Premium Technologies at No Cost

Use premium technologies without steep standalone costs or long implementation lead times. Rest assured that all of our technologies are fully scalable and geared for your specific growth trajectory.

Onboarding and Servicing

HubSpot	~~$495/mo~~ $0/mo
docusign	~~$150/mo~~ $0/mo
CROESUS	~~$295/mo~~ $0/mo
CONQUEST	~~$245/mo~~ $0/mo
Boomerang	~~$55/mo~~ $0/mo
nesto	~~$95/mo~~ $0/mo
Annual Savings	$16,020

Research and Data

Bloomberg	~~$2,300/mo~~ $0/mo
NATIONAL BANK	~~$175/mo~~ $0/mo
okta	~~$125/mo~~ $0/mo
aws	~~$95/mo~~ $0/mo
Annual Savings	$32,340

Operational Support

SPIFF	~~$85/mo~~ $0/mo
slack	~~$25/mo~~ $0/mo
MyPortfolio+	~~$175/mo~~ $0/mo
Google Workspace	~~$25/mo~~ $0/mo
asana	~~$35/mo~~ $0/mo
Annual Savings	$4,140

Total Annual Savings: $52,500

Optimize Wealth Management

Streamline Your Business

Optimize Wealth Management

Take Back Your Time

Our Platform eliminates all of those time-consuming and administrative tasks such as completing paperwork, getting accounts opened, and even trading, allowing you to focus on the highest impact activities like enhancing your relationships and connecting with current and prospective clients.

Eliminate Non-core Activities:

1. Completing Paperwork
2. Manual Trading
3. Re-entering Existing Client Data
1. Waiting for Advisor Support
2. Running Ad Hoc Reports
3. Creating and Sending Client Content

Result? 50 to 80% More Time for Your Team to utilize.

Optimize Wealth Management

Next-Gen Digital Onboarding and Servicing

Whether it’s opening a new account or submitting a service request like a Change of Beneficiary, our end-to-end Docusign integration eliminates everything to do with paperwork, which is a significant time saver.

Result? Eliminate Completing Paperwork to **Save Significant Time**.

Optimize Wealth Management

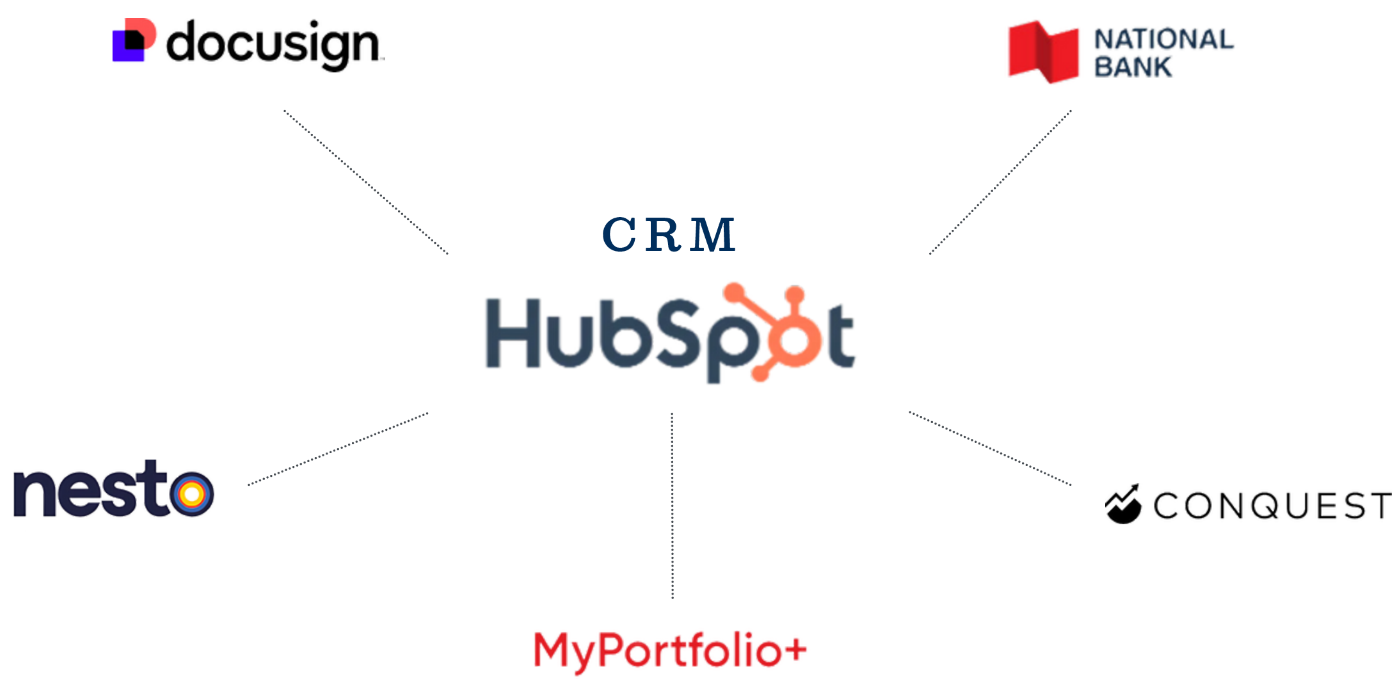
Streamlined Trading

With our platform, all trading is fully automated. Save significant time by eliminating manual trade calculations and processing—just point, click, and you're done. Accounts are instantly rebalanced, and funds can be effortlessly freed up for EFT requests.

Result? Eliminate Manual Trading to **Save Significant Time**.

Fully Integrated Client Data

No more re-entering existing client data. Whether you are creating a new financial plan or opening an account, our platform automatically populates existing client information—birthdates, SWP amounts, account values, and more—saving your team significant time and eliminating errors.



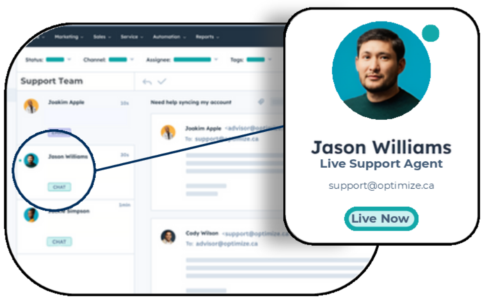
Result? Eliminate Re-entering Existing Client Data to **Save Significant Time**.

Optimize Wealth Management

Get 24/7 Advisor Support

Whether it's Technical assistance or some other Advisor Support issue, you'll be able to speak directly with our Live Agents literally 7 days a week, 24 hours a day OR instantly connect with our AI-Powered Interactive Service Agents through online chats and knowledge-based articles, getting you the answers you need, without the wait times.

24/7 Live Agents



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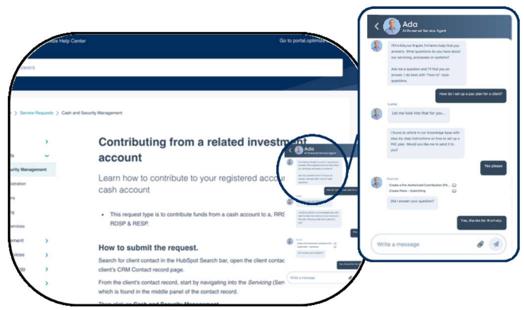
OR

AI-Powered Interactive Service Agents



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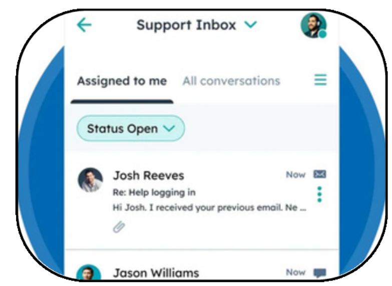
Average Wait Time: < 1 Minute



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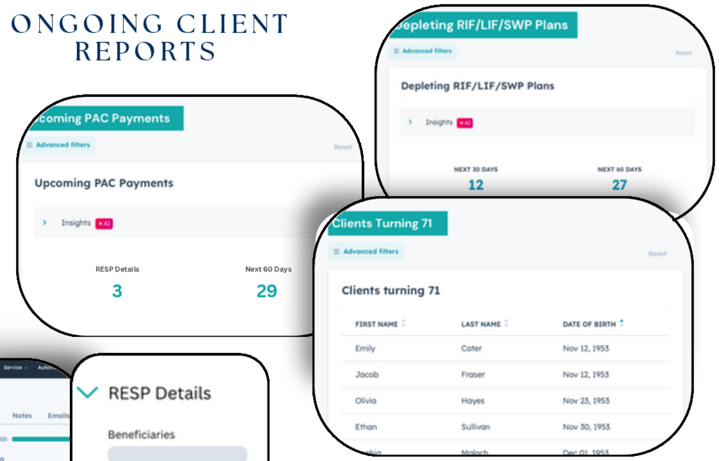
Result? Eliminate Waiting for Advisor Support to **Save Significant Time**.

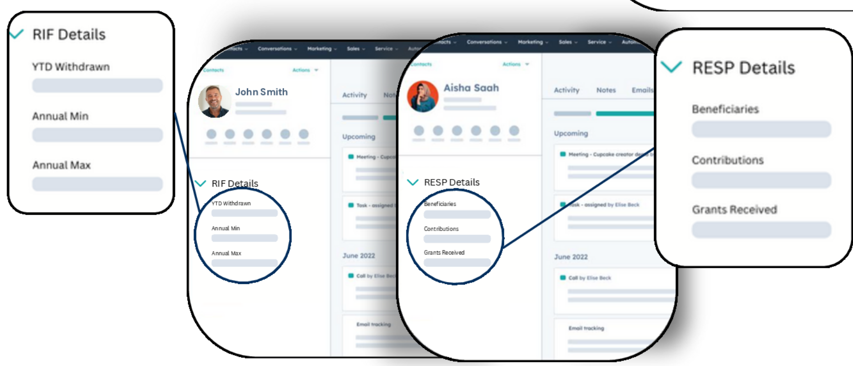
Real-Time Monitoring and reports Made Easy

Get real-time insights and tracking capabilities through our custom-built Dashboards and Reports to effortlessly monitor everything from your team's productivity all the way to your book's growth and your clients' ongoing PAC/SWP/RIF Plans.

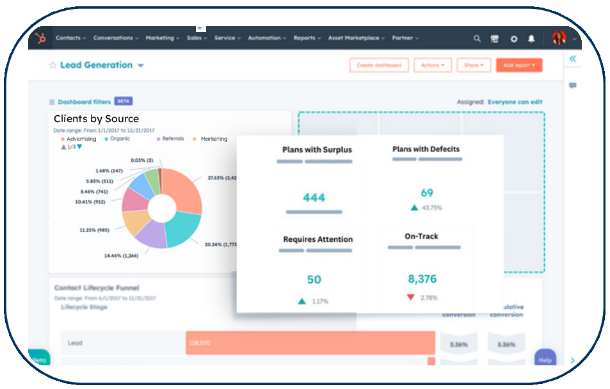
ONGOING CLIENT REPORTS



CENTRALIZED ACCOUNT INFORMATION



USER FRIENDLY DASHBOARDS



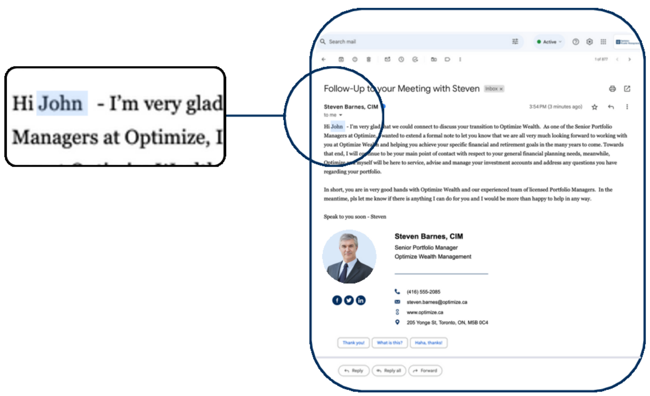
Result? Eliminate Running Ad Hoc Reports to **Save Significant Time**.

Optimize Wealth Management

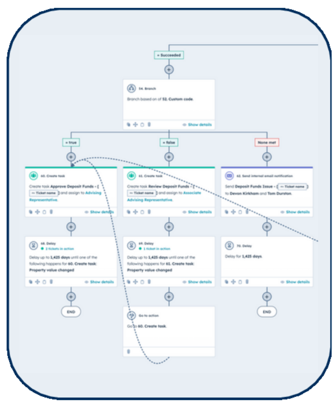
Fully Automated Client Content System

Implement our series of very high-end client servicing workflows, personalized interactions, and ongoing outbound communications, so that your team will never need to spend time again creating and sending content, maintaining email distribution lists, or monitoring content schedules, all while your clients are receiving impactful content, on a regular basis, and all branded for you and your team.

Personalized Interactions



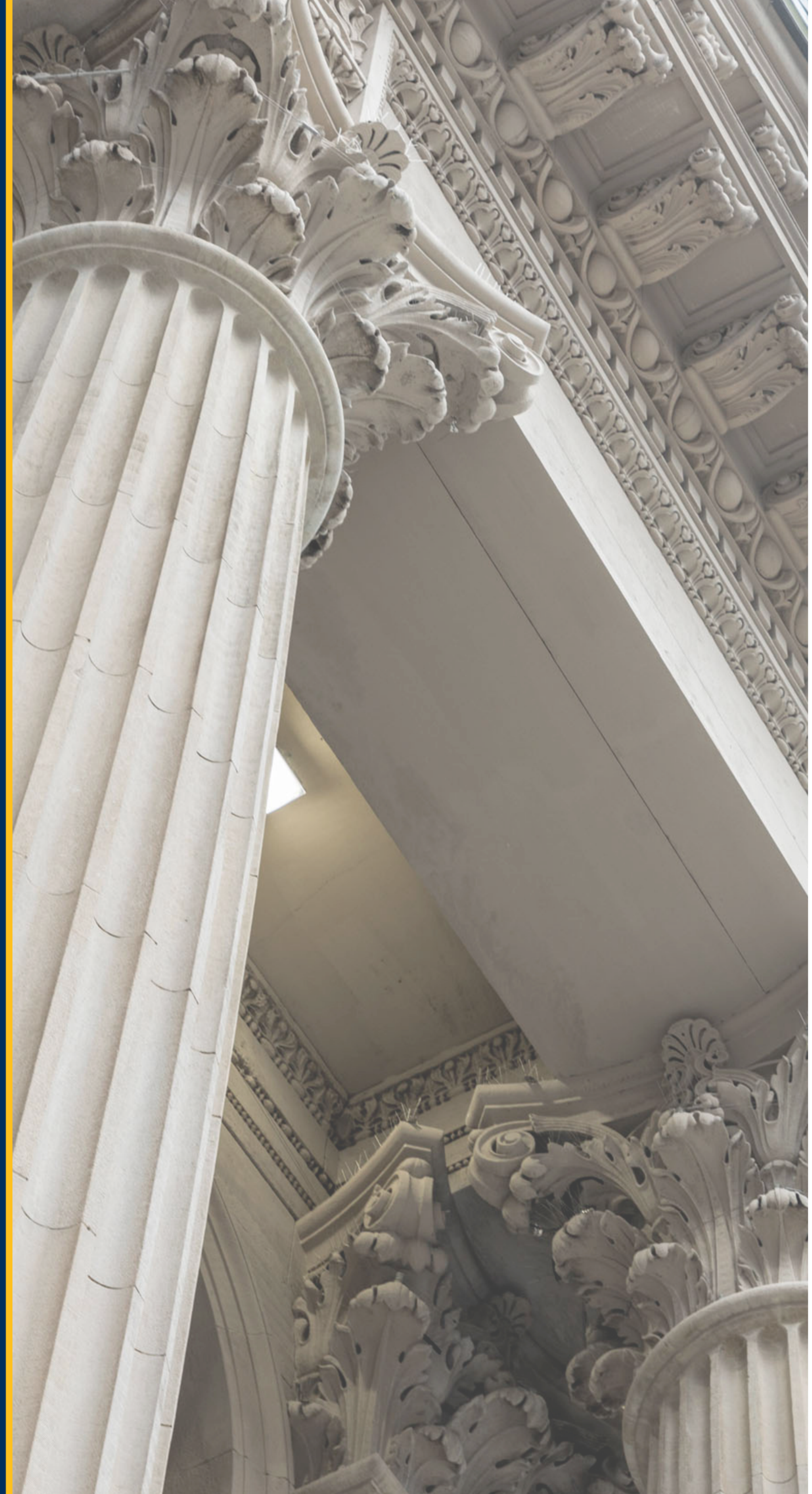
Automated Workflows



Outbound Communications

Enhanced Client Relationships

Result? Eliminate Creating and Sending Client Content to **Save Significant Time**.

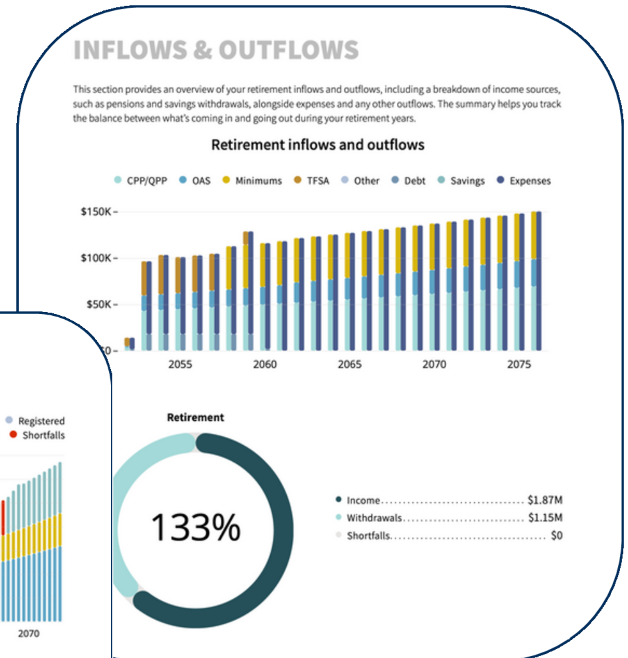


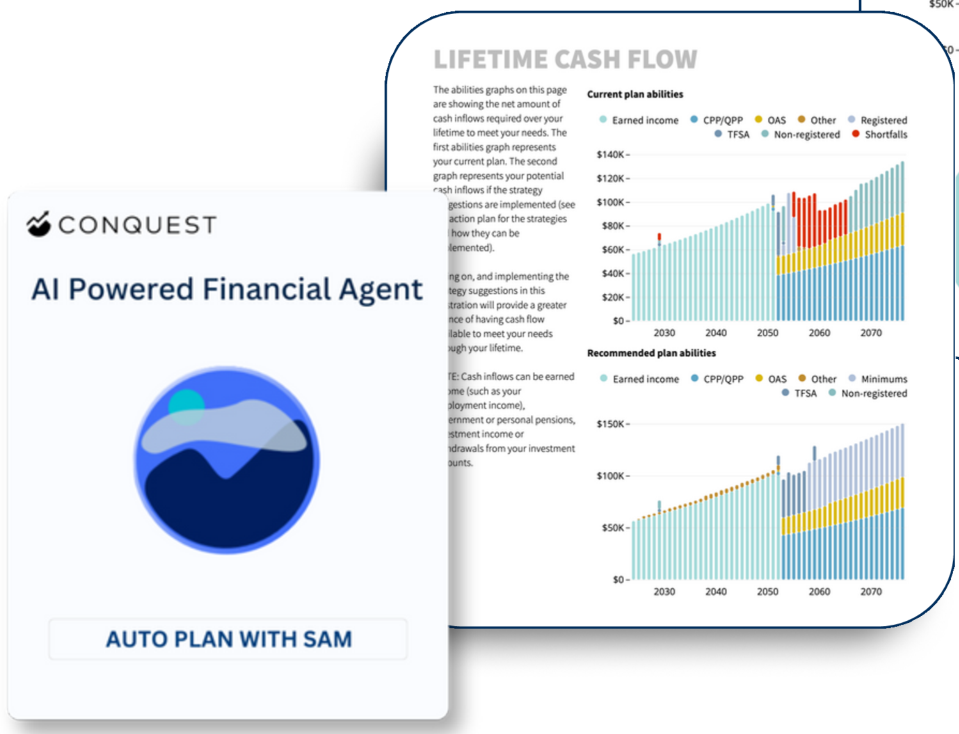
Elevate Your Client Experience

Next Generation Financial Planning

Access our Suite of fully integrated Software Programs such as our Comprehensive Financial Planning tools via Conquest to instantly offer your clients AI-powered personalized financial plans which instantly uncovers and delivers high-end strategies while saving you significant time in the process.

AI-Powered Planning

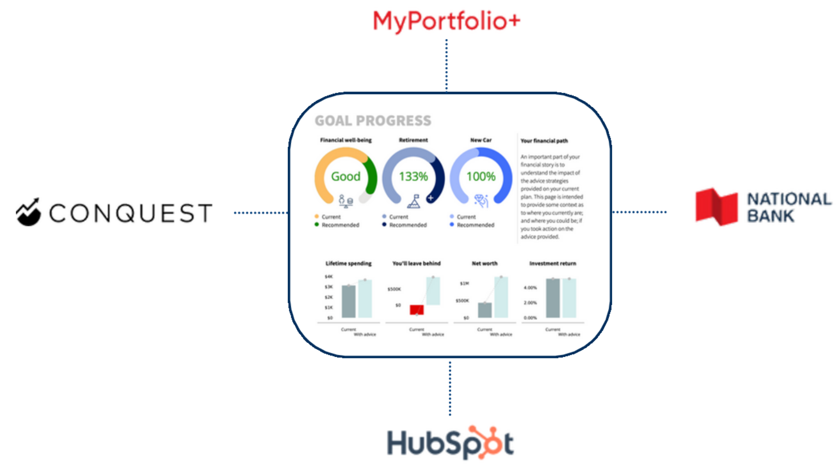




Real-Time Synced Data and Reports

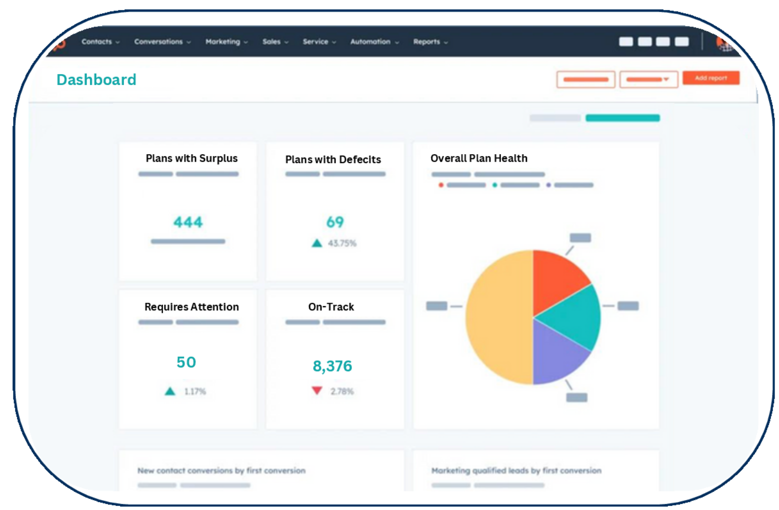
Real-Time Synced Data & Reporting

Whether it’s your client's investment accounts, market values, or even their ongoing PACs and SWPs, everything is constantly synced across our platform, so that you don't spend unnecessary time inputting unnecessary data.



Financial Planning Dashboard

Use our Financial Planning Dashboard to easily monitor high-level client goals such as their desired retirement age or lifestyle. Save time and get immediate clarity by viewing their Projected Estate Surplus or Deficit which is automatically synced with their investments' current market values and savings plans.



Optimize Wealth Management

Set Your Goals.
Let’s Make Them Happen.