For Advisors

RUNNING YOUR PRACTICE ON APPCROWN.

WHAT WE PROVIDE FOR YOUR PRATICE

- Automation:
  - Its powerful, its impacting, and its time efficient. The more time you spend with your clients and away from technology contributed to generating revenue.
    - Advisors who integrate and automate their internal workflows generate 33% more revenues compared to their peers
    - Top tier advisors who spend up to 65% of their time with client servicing activities generate up to 8x more in revenue versus the competition

- We automate firm's many workflows including marketing, client servicing and compliance activities. Our **powerful collaboration capabilities seamlessly connect home office with the reps and advisors in the office or in the field, allowing each to request, complete and track activities including compliance tasks, client service requests and marketing events without the inherent limitations of email.Powerful integration hooks ingest data from the many separate systems typically found in firms, including back-office data, portfolio management and email retention capabilities, dramatically easing the access and use of their data.Wealth managers can focus on building their businesses while the compliance and operating teams can support their growth while demonstrating effective implementation of the firm's policies and procedures.**

Prospecting for Advisors

- Automate your prospecting activities and make your firm efficient and ready for growth
- AppCrowns powerful client managmeent system, leveraging the global infrastructure of Salesforce.com, allow producers, for the first time, to hold all client contact details in one flexible database, available 24/7.
- Advisors are able to create customized email system, marketing analytics, mass emailing to hundreds of prospects, publishing white paper reports to your list with a click, integration with outlook for seamless contact and client tracking capabilities.
- Advisors have the ability to streamline the prospecting process, cutting down time to spend if only 2 hrs a day on prospecting activities. Time is of the essence; we give that to you.

Client On-Boarding for Advisors

- On Click Client on boarding makes your firm efficient. Less time dealing with paper-intensive activities leads to higher efficiency to building your book of business and client relationship activities.
- AppCrown automates every step of process, making it fool-proof. The history is already saved, so when the client converts from prospect to client, the system retains and automatically transfers all of the information so that it is readily available for moving forward with the new client relationship. No other single system can support this new client transition.
- Client on-boarding is now a snap. We integrate the client's record with their financial status from your back-office provider to give you a single dashboard through which to monitor and track the status of your new client.

Transaction Processing for Advisors

- Integrate your transaction processing with **with your client activity history for a complete picture of your service and value add.**AppCrown helps registered reps and RIAs by integrating your trading activities into your client management database and records.

Transaction Processing for Advisors

- Registered Reps - We automate your direct business trade flow including variable annuities, 529s and mutual funds. We link your order activity and documentation seamlessly and immediately with your back office and compliance team to ensure the order is processed accurately and without delay. We integrate your broker's billing and commission systems to ensure a smooth flow of information throughout the firm. This ensure your client's order is not held up and you are paid on time. Also, your clearing firm's trading system can also be integrated, helping to ensure you get the right trades associated with the right client each time.

Transaction Processing for Advisors

- **Advisors - We integrate your custodian's trade platform with your client data to ensure that allocations and notes are associated with the correct client record. This single overview of your client activity helps to ensure you provide the highest levels of service.**

Client Monitoring for Advisors

- **Sophisticated client analytics provide your with detailed monitors to ensure you spend your time effectively**
- **Make the Role of Advisors a Personal Role Again…**
  - Do you have multiple clients that demand different levels of touch and servicing? Now, AppCrownwill effortlessly monitor your clients' asset performance and your activity level with each. You will now receive alerts when anything is starting to drift - perhaps performance is dipping and you haven't reach out!
  - AppCrowncan even automate tasks for you. For example, birthday greetings can be emailed a few days ahead of each client's birthday automatically! Clients will come to believe that it is your superb time management and personal attention. You will know that you're using automation to scale your activities, allowing you to focus on the highest value added services

Client Analytics and More…

- Our AppCrown platform allows you to segment your entire book of business with one click. You can quickly analyze your book by client's age or assets for example. You can now quickly determine whether your spending too much time on seniors, or your average client assets are dropping.

Client Servicing for Advisors

- Client servicing can take up huge parts of your day. Processing requests and administrative tasks sucks the ability for you to focus on your client's asset growth.

- Have A State of The Art Workflow…
  - We have a library of advanced workflows that reduces complex tasks into a single click activity.
  - You can now fire off client requests for action as quickly as you can an email. We add more value per transaction by actively tracking the process of each request and who should be working on which part, you will automatically be alerted if there are any delays, which helps ensure that your clients are not left without any answer.
  - A history is kept of every engagement with clients (present or past), in the investors respective record, allowing advisors to retrieve historical and present information within moments. You are able to create goals per client through our unique ReportCard system.

Why Delay Having A State of The Art System for your Practice?

- Contact Mike Brodsky at Mike.Brodsky@appcrown.com or call at 888-989-8599 x122.