

# A technology partner, not a vendor

## The advantages of centralized purchasing

By leveraging best-in-class technology from Advicent for every client, enterprise firms can mitigate compliance risk by relying on a single calculation engine; your firm no longer has to fear litigation from inconsistent recommendations.



### Consistent calculations

Deliver consistent home-office reports by utilizing the same planning engine for all clients to ensure efficiency, effectiveness, and compliance



### Unique configurations

Empower your firm to tell its story and highlight its value through unique reporting, user experiences, and presentations



### Custom compliance workflows

Ensure compliance standards are met with firm and advisor workflows designed for your specific business needs



### Seamless client experience

Establish transparency and deliver a consistent client experience by administering your brand across a single product suite



### Scalable information access

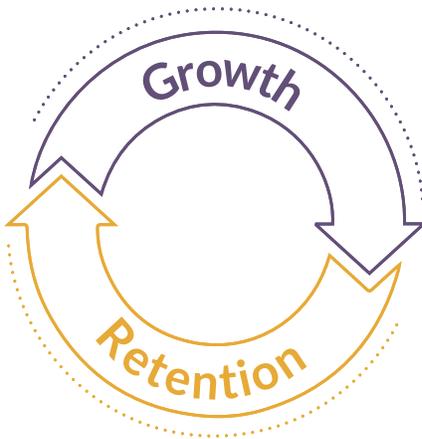
Establish security levels and define roles to ensure that employees have access to appropriate information



### Special pricing

Receive up to 65 percent off retail pricing when you purchase centrally

Advicent products are proven to accelerate advisors' success, fuel top-line growth, and strengthen client relationships.



**sell more products**  
per analysis or plan  
generated with  
Advicent software



**get referrals from  
each analysis or plan**  
created with Advicent  
financial services tools



**increase assets  
under management**  
when using Advicent  
client-facing solutions

### How a centralized purchasing strategy can positively affect your firm

One of America's largest independent broker-dealers previously experienced a low adoption rate of financial planning amongst its advisors. This service is extremely beneficial when documenting the intent behind any retirement advice — a major component of their compliance strategy. The firm serves over 135,000 households, and only **85,000 households had financial plans** prior to implementing Advicent software.

The low adoption was driven by the fact that the firm relied upon **three poorly integrated tools** to execute their planning strategy. The firm, therefore, required a solution that would streamline its planning, advice delivery, and reporting processes. As the firm researched possible solutions, it was determined that most technology could only solve for approximately **80 percent** of its client base. These potential solutions required rigid workflows that stifled an advisor's ability to recommend and sell products, causing a major roadblock for planning adoption. By selecting a single planning engine from Advicent for its advisors, the firm was able strengthen their compliance strategy without hindering their ongoing profitability.

### Discover why Advicent is the only provider able to meet the unique needs of your firm

With nearly 50 years of enterprise experience, Advicent is the only firm that truly understands how to navigate the complex intricacies of compliance workflows while empowering enterprise firms to deliver a consistent, unique digital experience.

We deliver scalable solutions that help your field and back-office teams increase efficiency in ways that other vendors cannot. Through our industry-leading deployment and training processes, we accelerate adoption rates, maximize productivity, and ensure a successful implementation.