

According to independent research from Investment Trends*

THE EFFICIENCY GAINS FROM USING IMPLEMENTED PORTFOLIOS ARE SIGNIFICANT

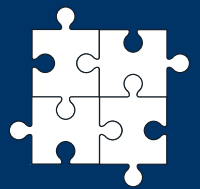


On average, IP users and their support staff experience time savings of 22.4 hours per week

Selecting/researching investments for client portfolios (3.0 hours saved)



Constructing portfolios (2.4 hours)



Monitoring market conditions for portfolios (2.4 hours)



Investment administration work (2.4 hours)



OUR USERS ARE IN AGREEMENT WITH THE POSITIVE IMPACT OF THE SERVICE ON THEIR BUSINESS AND THEIR CLIENTS

97%

agree their practice spends less time on investment admin and compliance

81%

say they have more time to spend with clients

61%

say their clients have become more engaged

48%

say their practice profitability has improved

*Independent research conducted by Investment Trends in 2017