

# Investigo saves you time and money and improves your productivity and profitability



## Benefits at a glance

*Investigo integrates the broadest range of practice management functions into one integrated, easy-to-use system, so you can:*

- **Spend more time on selling and client management**

*Users report saving up to one day per month on administrative functions and increasing revenues by up to 15 percent with additional time for selling and marketing.*

- **Improve client service**

*Accurate consolidated reporting not only enables you to make better investment management decisions, it also provides your clients with a single statement and an overall view of their portfolios' performance.*

- **Save money**

*Investigo integrates a comprehensive array of mission-critical applications, all at a fraction of the price of most other systems. And it eliminates the need to purchase and maintain multiple software packages.*

▶ Think of the time and money you spend marketing and managing your financial advisory practice. How much of it is spent on chores that don't really matter to your clients and don't do much to grow your business?

If you're not using Investigo, the answer is probably "too much."

Investigo's web-based platform integrates a broad range of practice management functions into a single system at a significantly lower price than competitive products.

Investigo saves you time and money—and improves your productivity and profitability.

The system:

- **Makes managing clients as easy as powering up your laptop.** Investigo creates a unified view of *all* client data, including contact-, task- and calendar-management tools, in one easy-to-use web interface. Our integrated CRM tool enables you to improve client relations and enhance cross-selling opportunities.
- **Frees up all the hours and dollars you used to spend manually massaging client data.** Investigo downloads, consolidates, updates and reconciles client data automatically. What took dozens of hours a month before is now done for you instantly.
- **Makes reporting smart and easy.** Investigo creates a wide variety of standard reports, such as asset allocation, client performance, performance history and billing statements—and customized reports based on your preference and your clients' needs.
- **Automates compliance.** Investigo automatically store trades and transactions and easily creates blotters and ledgers for compliance with NASD and other supervisory regulations.

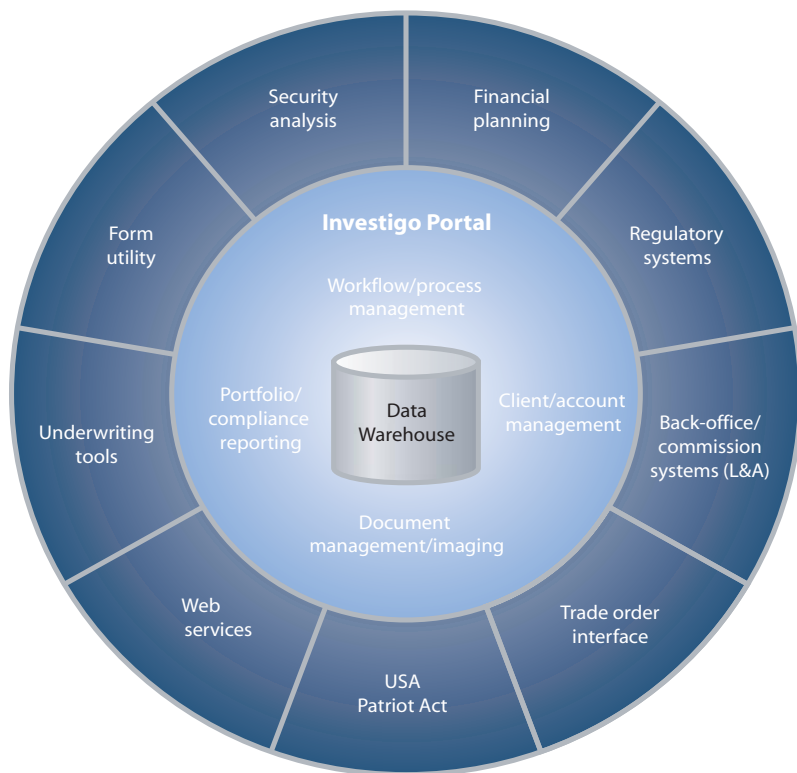
- **Replaces file cabinets and paper with on-line document storage/imaging.** Investigo securely stores wills, trusts and other important documents and provides instant access over any PC or laptop.
- **Makes your practice more efficient.** Investigo's built-in workflows enhance team collaboration with complete and comprehensive task management.
- **Improves your bottom line.** Investigo costs a fraction of what you're spending now, gives you more time to grow your business and slashes your office costs. Investigo users say their profits increase by 15 percent or more.
- **Improves your quality of life.** With Investigo, you spend less time on administrative chores and more time on what matters most to you and your clients.



**Investigo**<sup>®</sup>

## How Investigo works

Investigo is built on a sophisticated hub-and-spoke model. The hub is a powerful data warehouse and practice management system that compiles and aggregates data from multiple sources, including institutional custodians, clearing firms, third-party money managers, mutual funds and insurance carriers.



The spokes of the Investigo system are all the value-added applications you need to run your practice, such as financial planning, estate planning and research. Investigo partners with industry-leading vendors like MoneyGuidePro, LaserApp and Morningstar to provide you with best-in-class software for all those applications.

The hub and spokes of Investigo seamlessly exchange information, allowing you to view and manage data within one system. And because Investigo is a web-based application, it costs a fraction of other products and requires minimal up-front cost in hardware, training and branch office rollout.

## Investigo works the way you do

Investigo was designed by advisors for advisors. It intuitively works the way you do and allows you to spend more time on what matters most—keeping clients happy and growing your business. For more information, visit [www.investigo.net](http://www.investigo.net) or call 952.920.1441.

## Extensive functionality

- Powerful, automated data aggregation
- Robust reporting
- Integrated CRM
- Automated regulatory compliance
- Online document storage/imaging
- Workflow/process management

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