

# Digital Advisor Platform



## The next generation of digital advice for your next generation of clients.

Grow your business by putting a better investment experience in your advisors' and customers' hands with the Digital Advisor Platform from Advisor Software, Inc.

**Digital Onboarding:** Digital Advisor offers a comprehensive digital goal-based investment advice experience that you and your customers can access anywhere in the world, across any device, enabling a seamless digital account opening process with ongoing investment recommendations via a client portal.

**Custom Proposal Generation:** The Client Acquisition module quickly enables proposal generation both at the household and individual account level. Institutional caliber analytics controlled by the advisor enables a comprehensive review and recommendations when compared to the client's current portfolio. The proposal may be shared via a prospect portal in a flipbook presentation with access to seamless digital account opening.

**Financial Planning:** Naturally, the first step is understanding pre-retirement and post-retirement goals. Our quick intuitive workflows help both clients and advisors to work independently or in harmony generating Financial Plans. Our communication of ongoing analysis and recommendations through alerts and Client Portal updates helps keep the client on track to achieve goals. The customizable report includes a Balance Sheet and Cash Flow Analysis.

**Tax-Aware Portfolio Rebalancing:** Monitor and rebalance your entire book of business within minutes based on your own custom Model Portfolios and each client's unique constraints. Tax-Aware Rebalancing for an entire household of accounts with analysis of both managed and held away assets. Integrations allow easy submission of tax efficient trade files for order execution.

**Behavioral Finance:** We've built an innovative, research-based digital solution that measures a person's relevant behaviors and knowledge for making appropriate financial decisions.

Five integrated apps. One seamless advisor & client experience.  
Want to know more? Contact us and request a demo.