

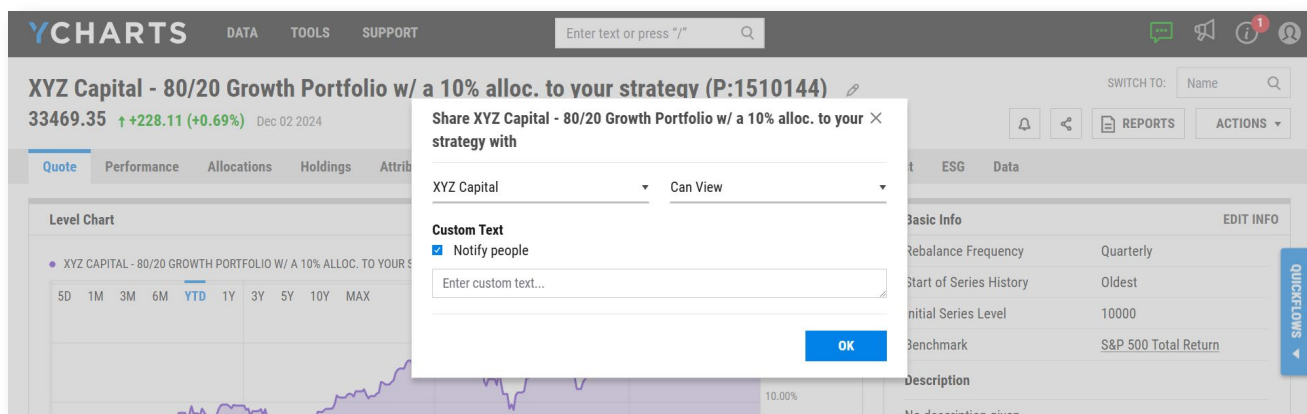
Share Firm-Specific Solutions to Advisors on YCharts

With YCharts, you can elevate portfolio consulting and distribution by sharing firm-specific solutions directly with your partner advisory networks.



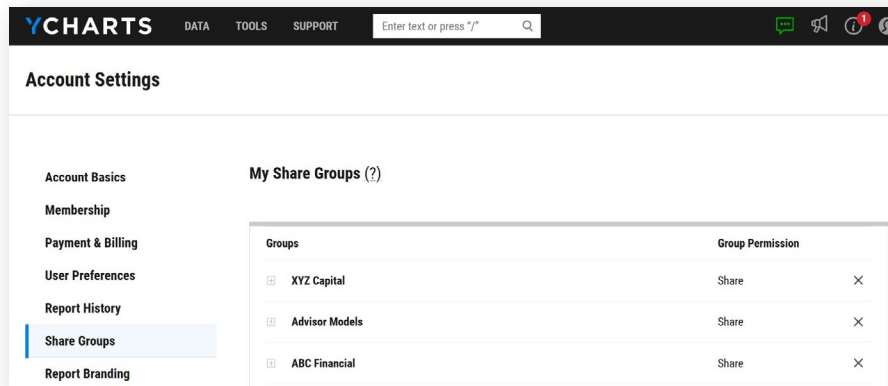
1 Tailored Advisor Distribution

- Distribute your suite of SMAs, funds, and even dashboards made in YCharts directly to specific advisors and firms.
- When reviewing a firm's model, incorporate your strategies and suggestions, then directly share the updated model with the firm in YCharts.
- Enhance shared dashboards with Portfolio Manager notes addressing firm-specific concerns, include recent rebalancing updates, and provide direct links to your firm's marketing materials for comprehensive advisory support.



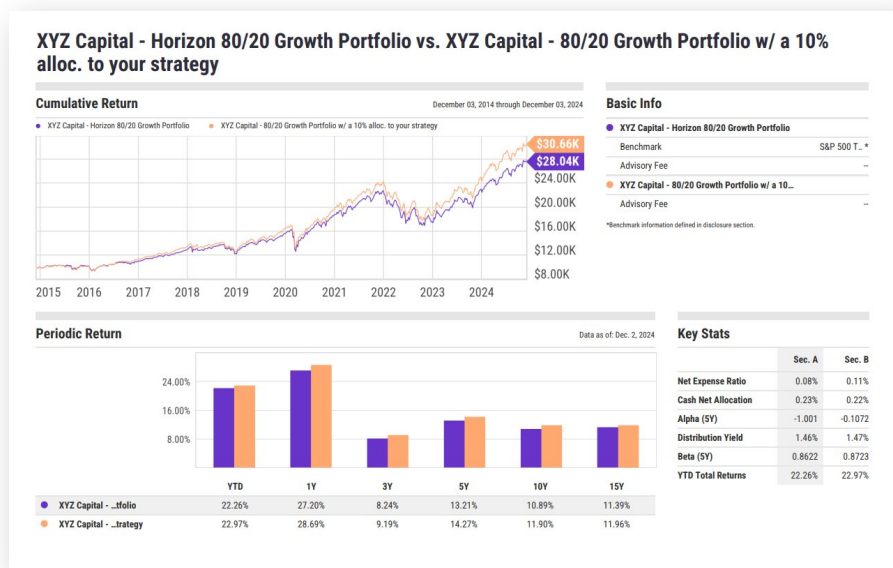
2 Precise Access Control and Enhanced Security

- Use YCharts to form groups directly, streamlining how your firm manages and shares bespoke solutions with advisors at specific Independent Broker Dealers or RIAs who already subscribe to YCharts.



3 Elevate Advisor and Client Satisfaction

- Nearly 10,000 advisors already use YCharts for research and client communications. If advisors within your network are already users, you can share strategies with them directly so they can conduct research and eventually implement positions into your products.
- By equipping advisors with tailored strategies directly within a familiar tool, you boost their capacity to meet and exceed client expectations, directly impacting client satisfaction and retention.



Use YCharts to enhance the distribution of investment strategies. Equip your advisory network with bespoke resources designed to elevate client outcomes.