

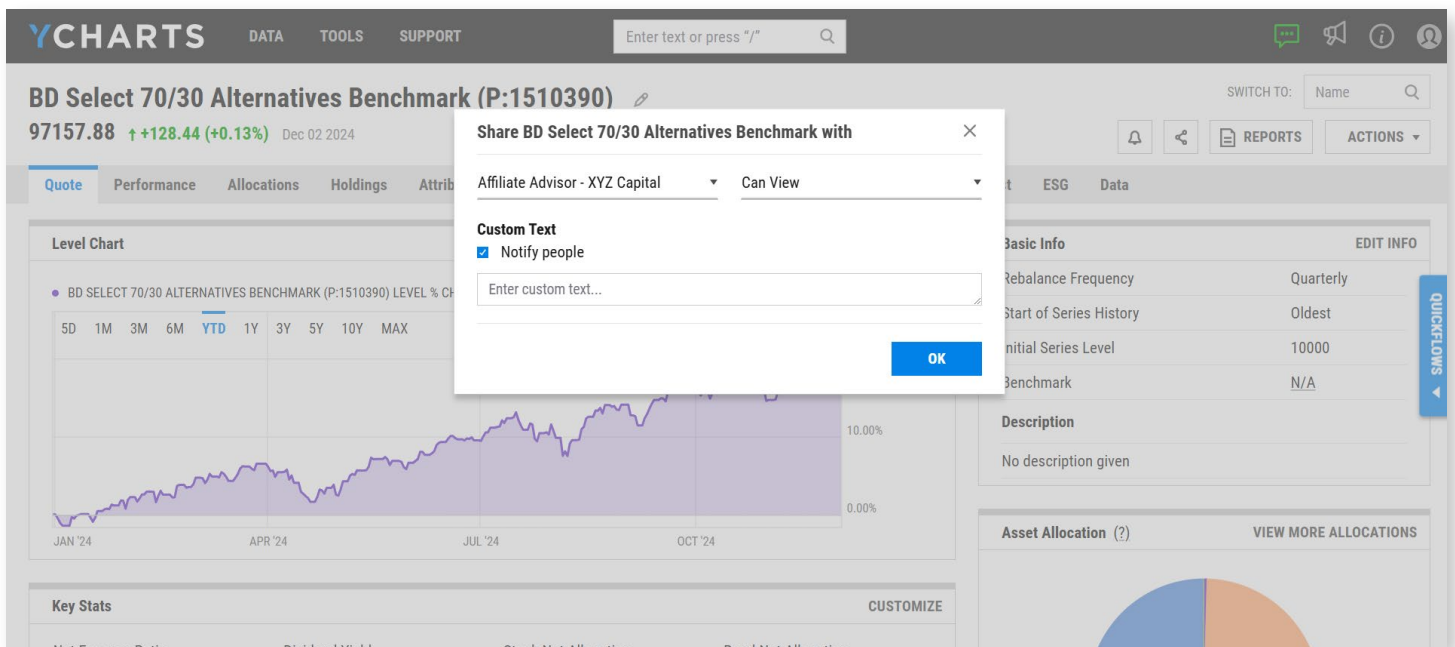
Sharing Specific Models to Affiliate Advisors on YCharts

As part of our enterprise solution, you can use YCharts to create and distribute firm-specific models, benchmarks, and research lists directly to affiliate advisors.



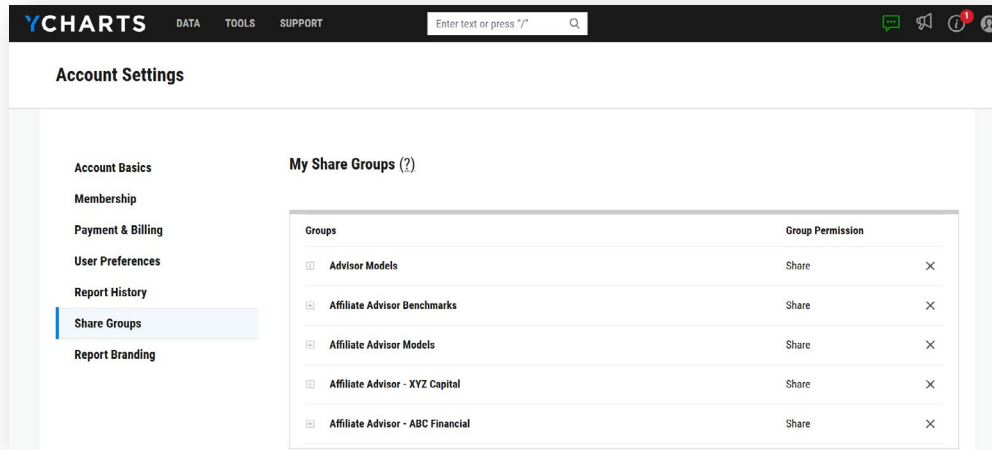
1 Tailored Portfolio Creation and Distribution

- In addition to being able to create firm-wide models and benchmarks, you can create separate affiliate-specific solutions in YCharts.
- Share these models or benchmarks directly within YCharts to selected advisors, ensuring each affiliate has access to tailored solutions while maintaining centralized control.



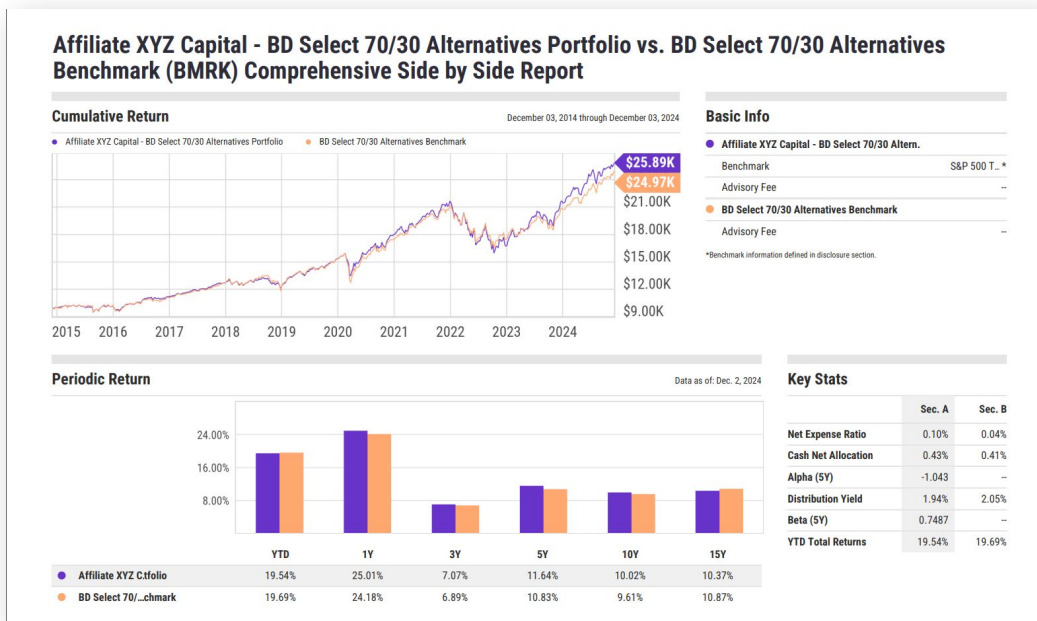
2 Precise Access Control and Enhanced Security

- Use YCharts to efficiently form and manage share groups, enabling your firm to still control the distribution of affiliate solutions.



3 Elevate Advisor and Client Satisfaction

- For advisors already using YCharts, integrating custom benchmarks and models directly into their workflow can dramatically enhance their effectiveness and facilitate new business opportunities.
- 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.



Empower advisors with bespoke resources designed to elevate client outcomes and provide the affiliate advisors the independence they've come to appreciate from your firm.