

DELIVER AN AMAZING CLIENT-MEETING EXPERIENCE

- Drive productive conversations and client meetings that increase engagement with personalized service.
- Uncover new opportunities that may not otherwise be recognized.
- Quickly identify strategies and tactics needing attention.
- Help clients make meaningful decisions as they plan for a better future.

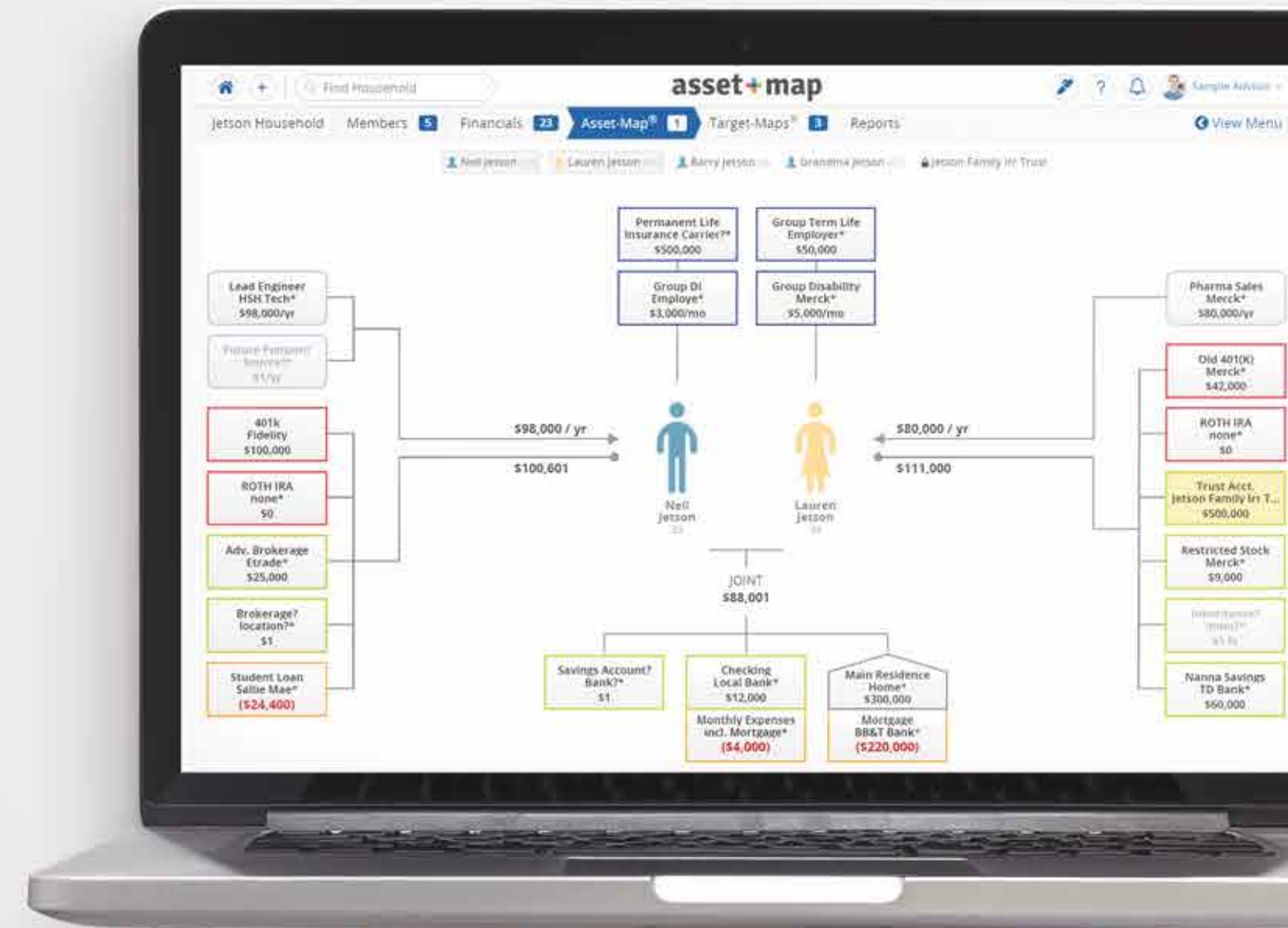


Contact our customer success team to start delivering an engaging and visual client experience today

Tel: 888-664-8850

Phone support operating hours are Mon-Friday, 9am-5pm ET.

Or visit us at www.asset-map.com to learn more.



asset+map

Visualize the possibilities

Empowering humans to see their full financial picture and make better decisions about what matters.

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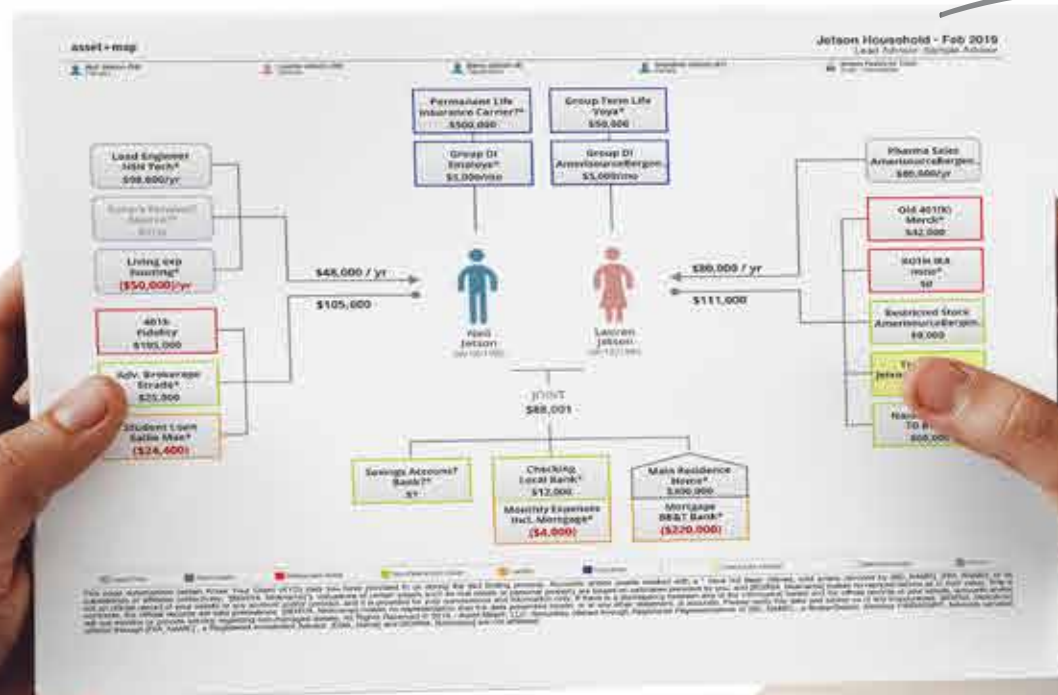
InvestmentNews

Visualize a client's complete financial inventory

on one page and inform progress to financial goals.



- See all of a client's financial accounts, insurance policies, income sources, and liabilities in a single, at-a-glance view.
- Apply advisor intelligence and insight to clients in real time.
- Visualize the complete financial picture to have a meaningful conversation about insights uncovered – and prioritize key decisions together.



What Asset-Map advisors say

Don't just take it from us. Hear what just a few of the thousands of financial advisors who use Asset-Map have to say about their experience:



"I use Asset-Map in all of my meetings. The ability to condense all of my client's financial holdings onto one easy to use screen is extremely powerful."

C. Simmerman, MBA



"I have never seen a more effective way to ask clients to share with us their current strategy. We are fixing and filling gaps every time we share an Asset-Map."

A. Rubin, CLU, ChFC



"My team has found Asset-Map invaluable. I honestly don't think I would have been able to support as many households as I do without this tool."

J. Maldonado, CPA



"I've been in this industry for a few decades and Asset-Map is the best thing I've seen. Acceleration of decision making is 1,000x better. Our 1,000 financial advisors are able to deliver a consistent and scalable client experience."

M. Dorman, ChFC, CFBS



"We have been using Asset-Map since 2012 and uncover more opportunities to talk about overall financial condition and wellness in every meeting. Clients love the simplicity."

W. Wiehenmayer, CFP, CLU, ChFC

