



# TRANSFORMING THE WAY THE WEALTH MANAGEMENT INDUSTRY DISCOVERS OPPORTUNITY

## ABOUT TRUELYTICS

Truelytics' **Advisor Transition Management Platform** is the first end-to-end data-driven system to help wealth management enterprises recruit, grow, and retain advisory businesses while reducing time and costs related to transitions.

MORE THAN

**20,000**

FIRMS IN OUR DATABASE

### Contact Us Today!

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 (800) 834-7494

## Firm Features:



### PRACTICE MANAGEMENT

- Business health summary
- Over 50 KPIs in Business, Client and Market stability categories
- Pro-forma financials projecting 5 years into the future of your firm
- 4 standard valuation calculations



### SUCCESSION MANAGEMENT

- Planned succession management via the TrueMatch public and private marketplaces
- Unplanned succession management via TrueContinuity's secure cloud-based continuity locker and alert workflows.



### PEER BENCHMARKS

- Ability to view Peer Group benchmark reports and see how your firm stacks up against other firms that are +/- 5% of your AUM.