

Options for Leveraging Robo Technology Within Your Firm

Presented by

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Why Robo-Tech?

“Those who do not continue to evolve risk becoming irrelevant. Companies either thrive, survive or die.”

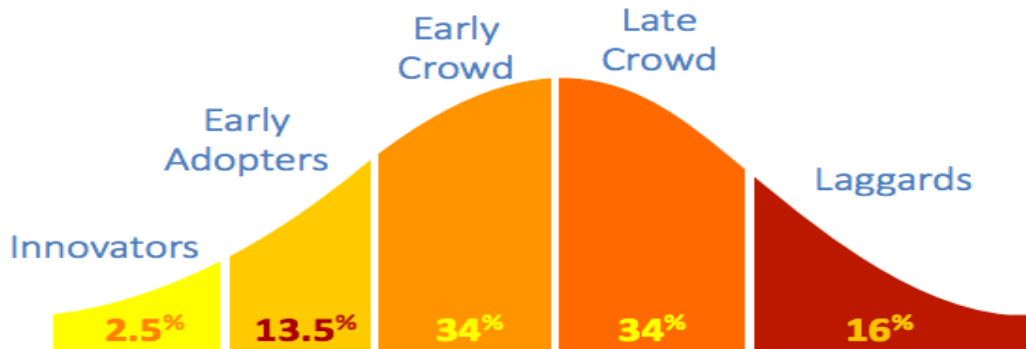
~ Deborah Fox

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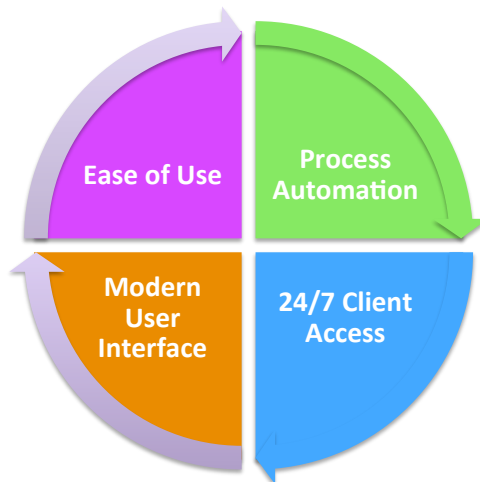
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Stay On the Left with Tech



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What Are You Looking To Gain?



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Which Choice Meets Your Needs?

- What tech capabilities do you already have?
- Where are your holes?
- Which processes do you want to automate?

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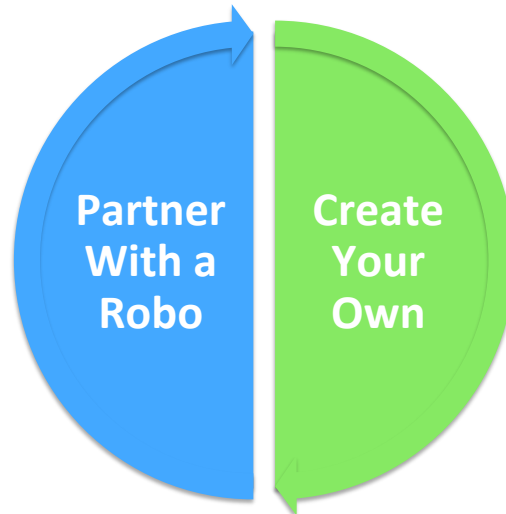
Decisions

- **What is most important to you?**
 - Client front-end experience
 - Your firm's back-end experience
 - Both front-end and back-end
 - Pre-packaged portfolios or ability to use your own
 - Flexibility

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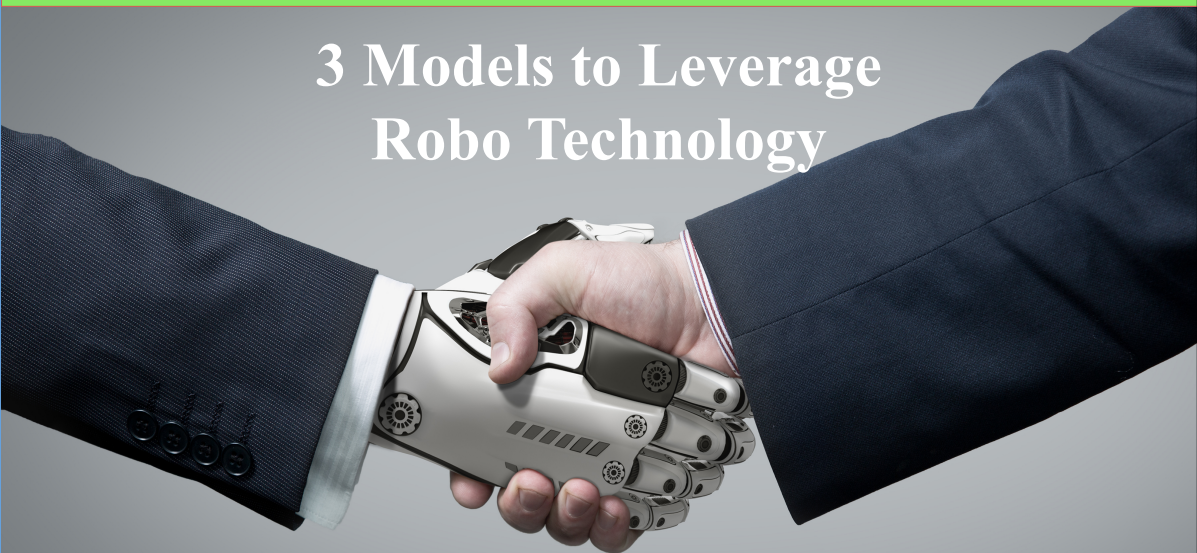
THIRD DECISION



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How to Choose Robo-Tech

3 Models to Leverage Robo Technology



Three Robo-Tech Models

- **Client-Facing Robo-Tech**

Prospect/client engagement tools, client portal, risk profiling, account aggregation, online account paperwork, etc.

- **Operations-Centric Robo-Tech**

Account opening, adviser portal, rebalancing, reporting, data analysis, etc.

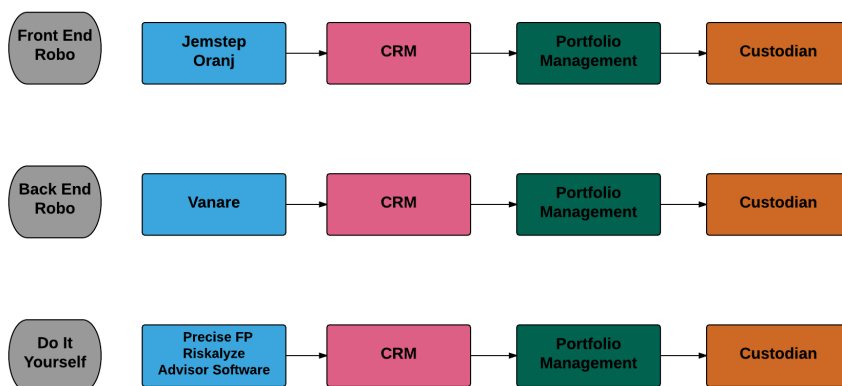
- **Custom-Designed Mix of Tech**

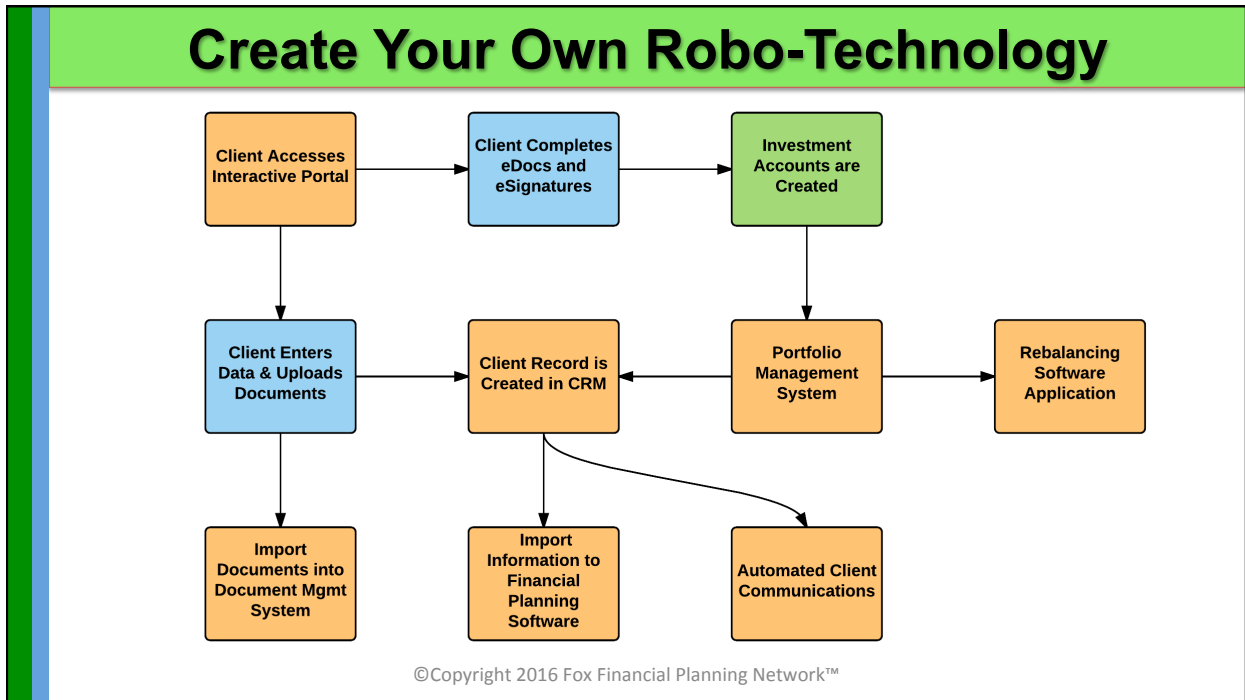
Integrating best-in-class software applications

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Designing Your Own Robo-Tech Platform





Tier 2 Revenue Model

150 clients x \$100/mo. = \$150K plus
50 clients x \$200/mo. = \$120K
Total Revenues = \$270K/year



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Utilize Robo-Tech to Create Your Dream Job



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RESOURCES FOR YOU:

**Fox Financial Planning Network:
AdvisorTouch Robo Practice Management Program
Just Released White Paper on Implementing Robo Tech**

**Complete Workflow System Templates & Detailed Tech,
Operations & Practice Management Ideas**

Just Released: NexGen Workflow System!

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