



TIFIN Grow helps financial advisors create hyper-personalized, intelligent investment proposals for their prospects by matching portfolios to an individual’s risk, planning, and financial personality insights.

Most digital experiences clients interact with – including music, clothing, books, entertainment and social media – have already become hyper-personalized.

Despite this, investments are often managed with a “one size fits all” approach with a limited understanding of who individuals are as investors and the individual needs of each person’s financial life. We believe the early adopters will benefit from increased alignment between not only the advisor and the client, but the client and their investments.

Learn your prospects' fears, needs, and wants through risk, planning and personality. Advisors will gain a comprehensive picture of their clients all in one easy-to-use and affordable solution, and provide a key differentiator in the process.

Once each person's unique profile is identified, advisors can deploy our cutting-edge technology to design and execute intelligent, hyper-personalized investment proposals for their prospects within one platform.

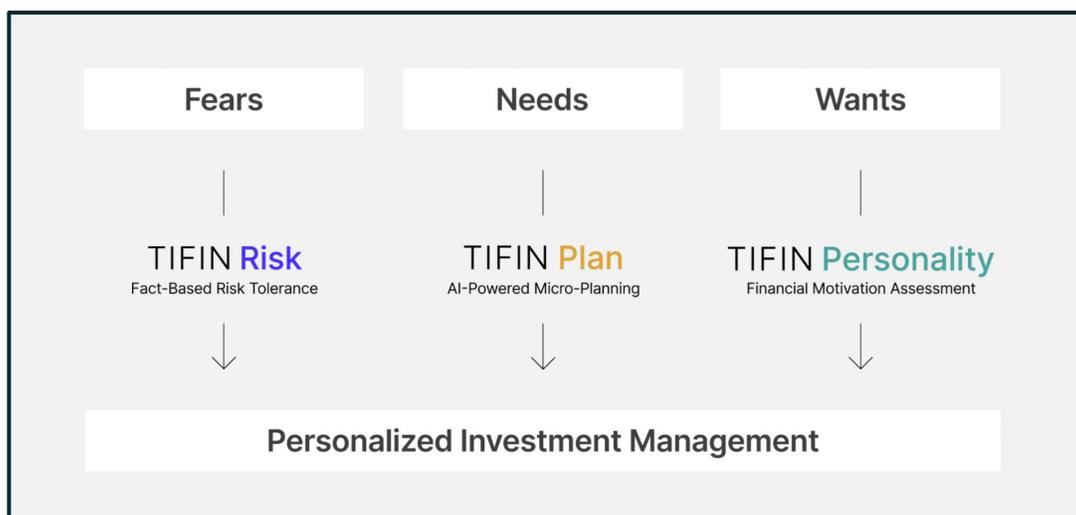


The platform also empowers advisors to be more efficient by streamlining their sales cycle and onboarding experience through next best action intelligence, prospect prioritization, and automated investment management.



Benefits for Financial Advisors

- AI-driven, proprietary Know Your Prospect technology
- Freshen up existing relationships as the platform reveals new opportunities with existing clients
- Differentiated, best-in-class technology
- Improved personalization means satisfied clients and increased referrals, leading to AUM growth
- Gain efficiencies through an expedited onboarding process
- Easily integrates with widely used CRM and custodian platforms
- Client Success Team to help you maximize use of the platform



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