



TIFIN Plan for Financial Advisors

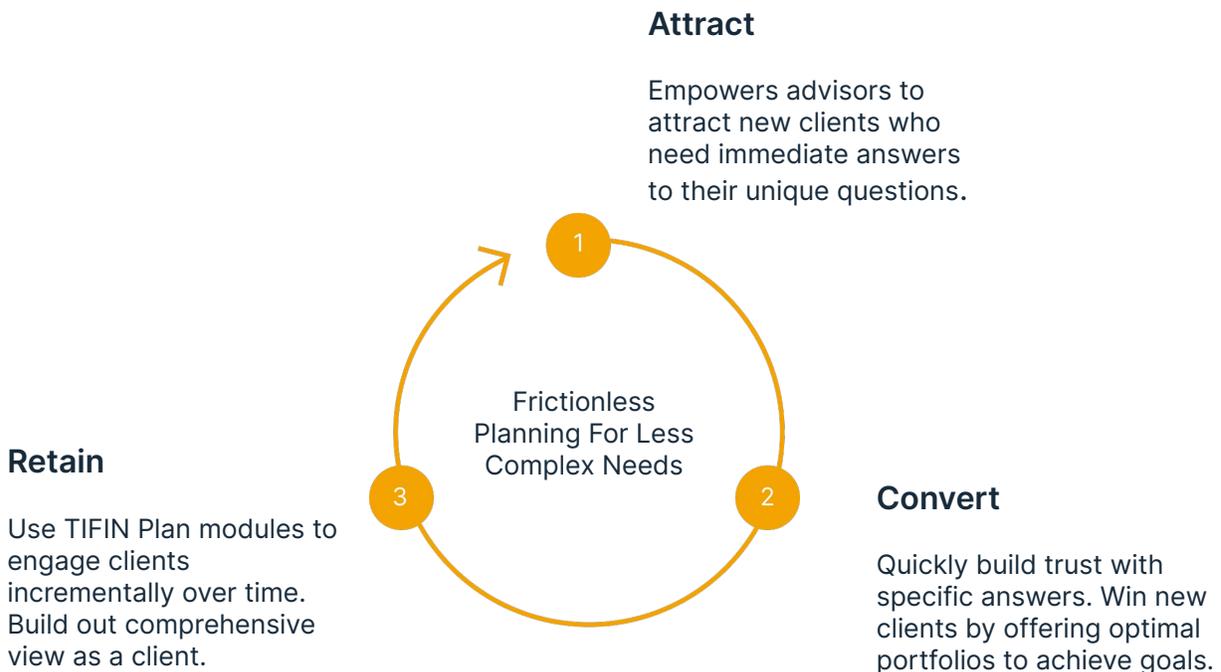
In a world where you demand efficiency, TIFIN Plan helps you engage prospects in real-time conversations, answer critical planning questions, and deliver investment advice to build trust and grow your practice.

Consumers often have specific questions driven by their fears, dreams, and life circumstances. TIFIN Plan was built using Conversational AI technology to help you get to the heart of the matter, allowing you to quickly engage consumers in collaborative and engaging conversations.

Conventional questionnaires are often abandoned before you can get the information you need to help and convert clients. The Plan journey was designed to use minimal inputs and focuses on the minimum amount of pertinent inputs to provide a the right initial answer.

Plan is designed for you to capture the information you need across a variety of critical lifecycle events, and then act on that information through our easy-to-use platform. Our platform is designed to make your investments work with your plan - and adjusts both based on needs and suitability.

Plan is designed to help you drive implementation through an end-to-end client experience from conversion through retention.





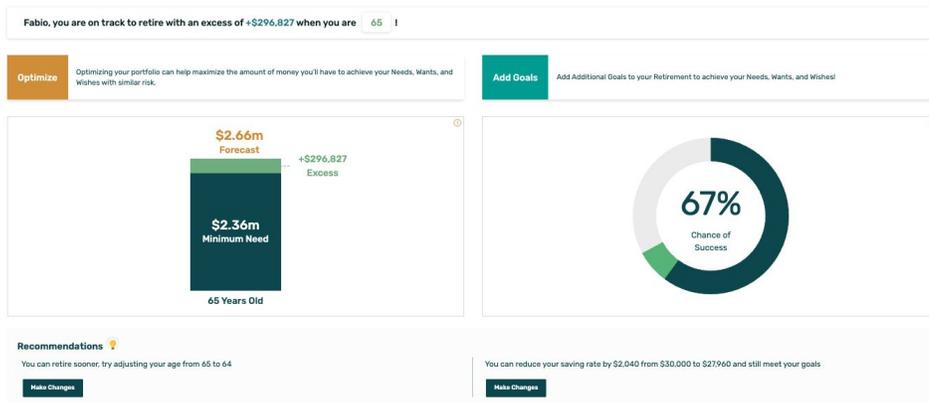
Benefits to Advisors

- Allows advisors to deliver goals-based financial plans in minutes
- Explore a variety of microplan scenarios across a full lifecycle
- Use efficient planning to build trust and convert prospects and engage
- Implement within your segmentation strategy to engage Next Gen clients
- A single platform for financial planning and portfolio recommendations
- TIFIN Risk integration allows you to optimize portfolios to client goals and risk tolerance
- Upload your model portfolios and constraints and match clients to your strategies

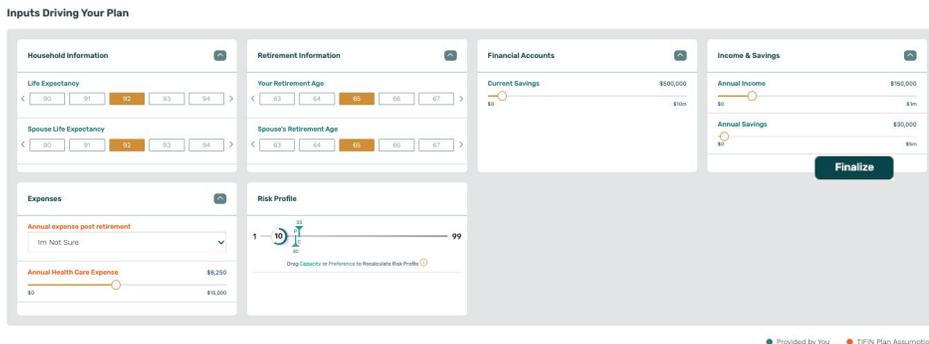
Winning with TIFIN Plan

Convert clients through immediate value-add.

Offer specific answers to investor questions



Easily refine interactively to engage and educate



Update the plan to see impact