

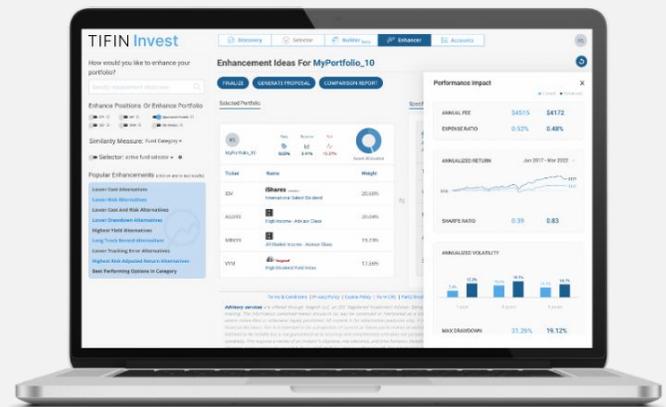


# Investment Intelligence at Your Fingertips

TIFIN Invest is transforming how thousands of advisors navigate an investment marketplace with tens of thousands of stocks, mutual funds, ETFs, model portfolios and even SMAs.

## Go from prospect to proposal in minutes

Win more clients with personalized investment proposals that illustrate the potential impact of your recommendations.



Add to	Name	Fees	Return	Risk	Sectors
	SIXH \$30.9 ETF ETC 6 Meridian Hedged Equity Index Option Large-Cap Blend	0.84% Average	14.43% Average	8.31% Low	
	PHDG \$34.5 ETF S&P 500 Downside Hedged Long-Short Equity	0.40% Low	14.33% High	9.29% Average	
	HEGD \$17.7 ETF SCHWAB Hedged Equity US Large Cap Options-based	0.82% Average	16.93% High	6.55% Average	
	OVLH \$26.5 ETF OVLH Hedged Large Cap Equity Large-Cap Blend	0.83% Average	20.91% High	8.56% Average	

## The search engine of choice for financial advisors

Like your favorite search engine, except all the results are investments so you can quickly find and compare investments across more than 100 different metrics.



### Discover

Identify the best investments and provide tailored recommendations based on each client's preferences.



### Select

Leverage selector to find and compare investments that are the best fit for your models and client accounts.



### Enhance

Craft hyper-personalized investment recommendations that showcase valuable enhancements across themes, risk, fees, returns, and more in minutes.



### Manage

TIFIN Invest provides integrations with leading custodians, such as Schwab and TD Ameritrade, so you can manage your book of business in less time and with fewer resources.



Advisors who sign up for a TIFIN Invest account immediately gain access to some of our most popular features including:

- A semantic search engine to discover tens of thousands of investments
- Tools to uncover thematic investment opportunities
- Investment data from Morningstar, Fi360, and other partners
- Exclusive content from asset managers and thought leaders

And best of all, you get all these features and more at no cost with a Magnifi account.

Upgrade your access to unlock more at any time. Our platform enables financial advisors to quickly enhance portfolios and present high-impact modifications to new and existing clients.

Enjoy the ease of creating personalized proposals that demonstrate the value of your recommendations within our AI-powered solution.

The question is, what will you search for first? Look up holdings, trends, and complex queries across your entire book of business.



### Optimize Portfolios

Find potential enhancements across risk, returns, fees — and even themes like ESG — for your investment sleeves, models, and client portfolios.



### Personalize

Create scoring models to compare ETFs, mutual funds, model portfolios, and SMAs customized to your investment philosophy.



### Save Time

Search your entire book in seconds to uncover accounts that have cash to invest, a specific exposure or need rebalancing.

To learn more visit [TIFINwealth.com/invest](https://TIFINwealth.com/invest)