TIFIN Plan for Financial Advisors

In a world where efficiency is a must-have, TIFIN Plan helps you engage prospects in real-time conversations, answer critical planning questions, and deliver investment advice that builds trust and helps 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 arrive at the heart of what they need, allowing you to quickly engage them 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 to help you drive implementation through an end-to-end client experience from conversion through retention.

Convert clients by helping them address immediate pain points where you can show immediate value. Capture the information you need across a variety of critical lifecycle events, and then act on that information within our easy-to-use platform across 15+ common questions. Make client investments work with each plan—and adjust both based on needs and suitability.

Attract

Empowers advisors to attract new clients who need immediate answers to their unique questions.

Retain

Use TIFIN Plan modules to engage clients incrementally over time. Build out comprehensive view as a client.

Convert

Quickly build trust with specific answers. Win new clients by offering optimal portfolios to achieve goals.

TIFIN Plan for Financial Advisors

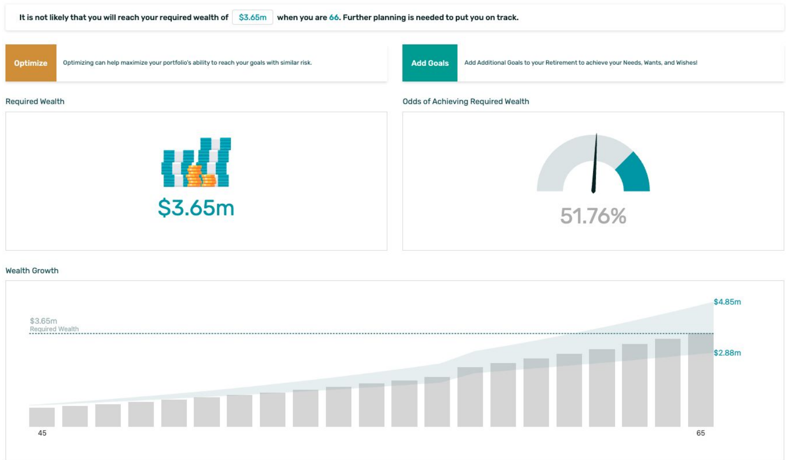
Benefits to Advisors

- 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
- Engage Next-Gen clients by helping them with the steps along the way to retirement
- Enact financial planning and portfolio recommendations within one platform
- Integrate with our risk tool to optimize portfolios to client goals and risk tolerance
- Upload model portfolios and constraints, then 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