



Practifi **Media Kit**



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Our vision

Practifi's proposition is clear: Growth

Practifi is more than a CRM provider. It is a platform helping business owners, advisors and managers grow to their potential.

“Growth” means more than revenue. Practifi helps users discover what growth means to them and work toward that goal. Whether it be growing a team, leads or the time to strategize – Practifi can assist.

More than a CRM, Practifi is a business management platform designed for growing financial advice businesses around the world. Our easy-to-use program allows RIAs, family offices

and broker dealers to effortlessly manage their client relationships, monitor compliance and automate workflows.

Global perspective, local support

Our clients are trusted to grow the prosperity of millions of customers around the world. Our job is to make that an easier, more connected and more delightful experience than ever before.

We provide the ecosystem and support to ensure every advice firm fulfills their growth potential. In a sea of disparate technologies, Practifi is a unifying force. With Practifi, efficient operations and excellent customer experiences are a reality.

Built on the Salesforce platform, the world's No. 1 enterprise cloud, Practifi is secure, reliable and massively scalable. With an ever-growing list of useful features and best-in-class integration partners, Practifi helps users deliver beyond customer expectations and easily meet compliance requirements.

Based in Sydney and Chicago, the Practifi team champions our clients across North America, Europe and APAC. With a beautifully designed platform and a strong commitment to client success, Practifi is the new benchmark for CRM systems in financial advice.

Practifi brand



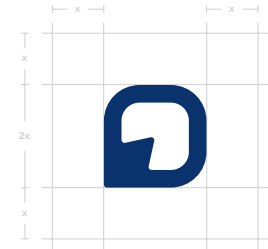
01 | Stacked



02 | Corner stack



03 | Horizontal



04 | Badge

Badge focussed.

The Practifi logo can be used in a number of ways including stacked, corner stack, horizontal and badge. One defining rule of these options is that the badge is always present.

Safe zones

It's always good to keep some space around your logo so things don't get cluttered. The minimum amount of space around the Practifi logo has been determined by the cap height of the type.

Practifi brand continued

Avoid.



Don't stretch! Always good to respect the ratio.



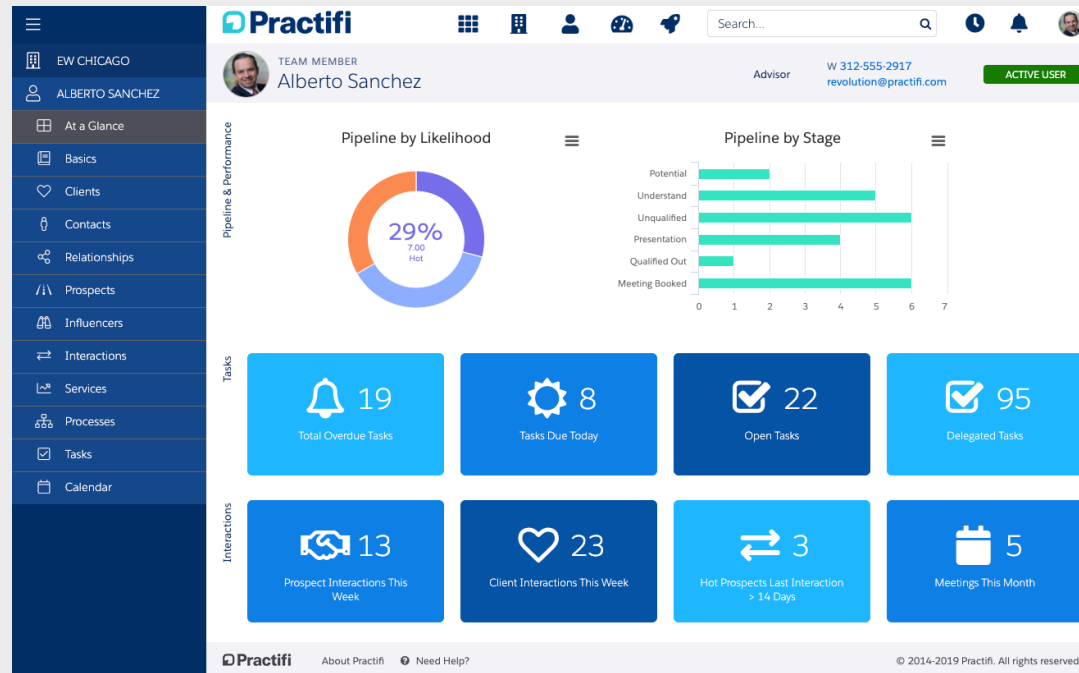
Missing badge! The type was made to stay near a badge.



Orange with teal. They look great near each other, but not touching.

Colour combos.





Practifi features

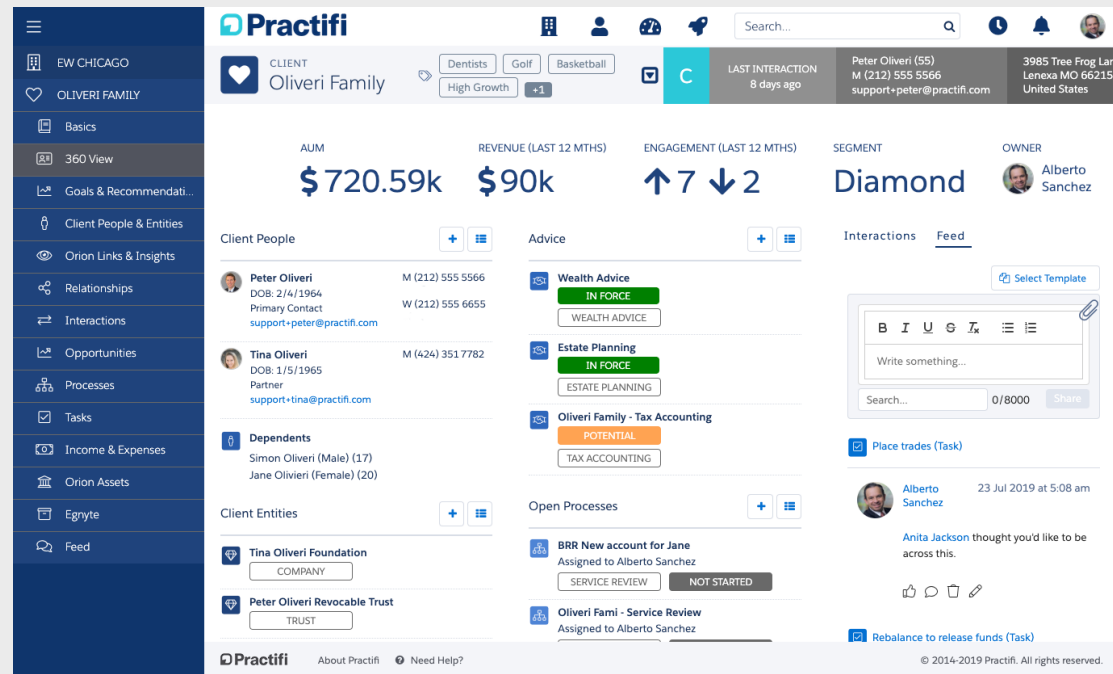
Customer expectations and compliance requirements have evolved beyond traditional CRM capabilities. In today's world, growing an advice business relies on using the right tools that bring the user's ecosystem together and enable sustainable scalability.

Complete client management

A critical part of compliance is the ability to track every aspect of client service. Practifi's 360 View keeps users on top of ongoing service commitments, interactions, important dates, revenue, affiliated client entities and much more. With a live feed on each client record, users can communicate with team members in real time.

User-tailored dashboards

Not everyone at an advice firm does the same job. Customized user views filter out the noise so everyone can get the job done efficiently. Practifi gives instant access to assigned clients, key dates, tasks and workflows unique to each team member.



Practifi features continued

Growth visualization

Practifi gives users the power to accelerate their growth by accessing data usually trapped in disparate platforms. Users can segment and manage their clients with extreme precision. In addition, flexible organization options allow users to organize client information in a way that suits their needs.

Enterprise workflow automation

More than just tasks and processes, Practifi automation manages dates, alerts, compliance commitments, marketing and more. With our powerful enterprise workflow engine, users can control every process, from fact-finding to finance and everything in between.

Influencer insights

Client and partner referrals are the richest source of new business for advisors. With our unique relationship view, users can easily explore relationships between clients and client entities. With these deep insights, users can identify influencers and new business opportunities.

The screenshot displays the Practifi CRM interface. On the left is a dark blue sidebar with navigation icons and labels: EW CHICAGO, ALBERTO SANCHEZ, At a Glance, Basics, Clients (highlighted), Contacts, Relationships, Prospects, Influencers, Interactions, Services, Processes, Tasks, and Calendar. The main header area shows the Practifi logo, user profile for Alberto Sanchez (TEAM MEMBER, Advisor), contact info (W 312-555-2917, revolution@practifi.com), and an ACTIVE USER status. Below the header, the 'Clients' section features a '+ Add' button and filter tabs for STAGE, SEGMENT, ENTITY TYPE, and CREATED. A table lists clients with columns for CLIENT, PRIMARY CONTACT, LOCATION, OWNER, and AUM. The table contains 8 rows of client data, including household and company names, their primary contacts, locations, and associated AUM values.

CLIENT	PRIMARY CONTACT	LOCATION	OWNER	AUM
Abbey Household CLIENT DIAMOND	Georgia Abbey	Statesboro GA	Alberto Sanchez	\$8,120,424.79
Adkins (D&Y) Household CLIENT BRONZE	Yolanda Adkins	Wayne NJ	Alberto Sanchez	\$169,778.00
Alford (A&A) Household CLIENT SILVER	Andrea Alford	Sacramento CA	Alberto Sanchez	\$413,367.00
Anthony (V&D) Household CLIENT BRONZE		Carlisle AR	Alberto Sanchez	\$447,332.00
Barrera (T&D) Household CLIENT SILVER	Donna Barrera	Farmington MN	Alberto Sanchez	\$223,935.00
Bauer (G&R) Household EX-CLIENT GOLD		Westminster CA	Alberto Sanchez	\$456,837.00
Bayshore Company LIKELY BRONZE			Alberto Sanchez	\$1,575,000.00

Practifi features continued

Powerful workflow analytics

Logging time, tracking tasks, and providing comprehensive workflow reports shouldn't take up every hour in the day. Practifi gives precious time back to advisors so they can focus on growth. Our real-time reporting gives users the confidence to pass the most rigorous audits.

Detailed business reporting

Manual data manipulation is not only outdated - it's risky. Practifi enables users to monitor every aspect of their firm, from sales performance and process delivery to industry compliance, revenue tracking and more. Replacing obsolete spreadsheets and tedious manual analysis,

Practifi makes it easy to filter and segment data for fast results.

Our integration partners

We're constantly integrating with the best portfolio management platforms, productivity and advice tools to eliminate rekeying, reduce risk and build growth.

Portfolio management and advice tools

There's a great variety of portfolio management and advice tools out there and we make it a priority to integrate with the very best.



Marketing and communications

Key integrations connect Practifi users with their favorite marketing platforms for seamless marketing automation and event management.



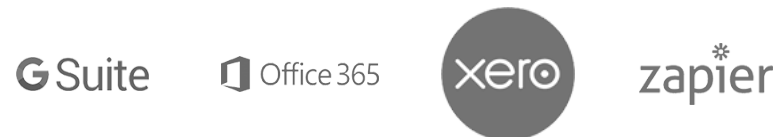
Document management

Practifi makes it easier than ever to access important information when it's needed most. Our integration partners offer document transformation and digital signatures as well as safe and secure storage.



Productivity and business management

Productivity is key, which is why we've integrated with some of the industry's best business management and collaboration tools.





Meet our leadership team

“Growth infuses everything that we do. It’s at the core of our entire design. Our job is to make life easier for you, our clients, so you can grow the wealth and prosperity of yours.” – **Glenn Elliot, CEO**



Adrian Johnstone
Co-Founder and Chief Commercial Officer

Adrian has over 20 years experience helping advice businesses of all sizes leverage technology for growth.

A regular presenter at industry events in Australia and United States, Adrian offers deep insight into the technology needs of advisors. Adrian owns Practifi's go-to-market strategy and direction globally.

Glenn Elliott
Co-Founder and Chief Executive Officer

Glenn has spent over 20 years creating leading-edge customer applications for some of the most innovative enterprises in the UK, Australia and United States.

Glenn's designed enterprise cloud systems since 2005. His expertise in integrated, best-of-breed fintech powers Practifi's product roadmap and partner ecosystem.

Emily Wilcox
Chief Operating Officer

With a track record for outstanding customer service in financial services and technology, Emily leads Practifi's operations across Australia and the United States.

Emily's background in law and management consulting drives Practifi's expansion plans from the ground up, with a relentless focus on client success and shared growth.

Notable clients

We're proud to work with advice firms that make a difference:



Client testimonials



“Practifi has changed my professional life. I was always hoping it would be the centre of my firm for the next three decades and that hope has been exceeded by my reality so far. Finally, we are creating the advice machine I’ve always wanted.”

Joshua Cratchley
Financial Advisor & Co-Founder, Plenary Wealth



“After being frustrated with our previous CRM we made the move to Practifi and what a relief. Our firm is now more efficient, our clients have a better experience and our staff knows what happens, when and how. Now we can spend more time working ‘on’ the business than ‘in’ the business.”

Robert Baharian
Founder & CEO, Baharian Wealth Management



“I’ve been working with Practifi for a little over 12 months and it’s been a total game changer for my business. We’ve increased efficiency, are managing our workload more effectively and are making sure we’re sticking to our compliance all at the same time.”

Ben Nash
Founder & Financial Advisor, Pivot Wealth

Information for media inquiries

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