



# 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 focused.

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.



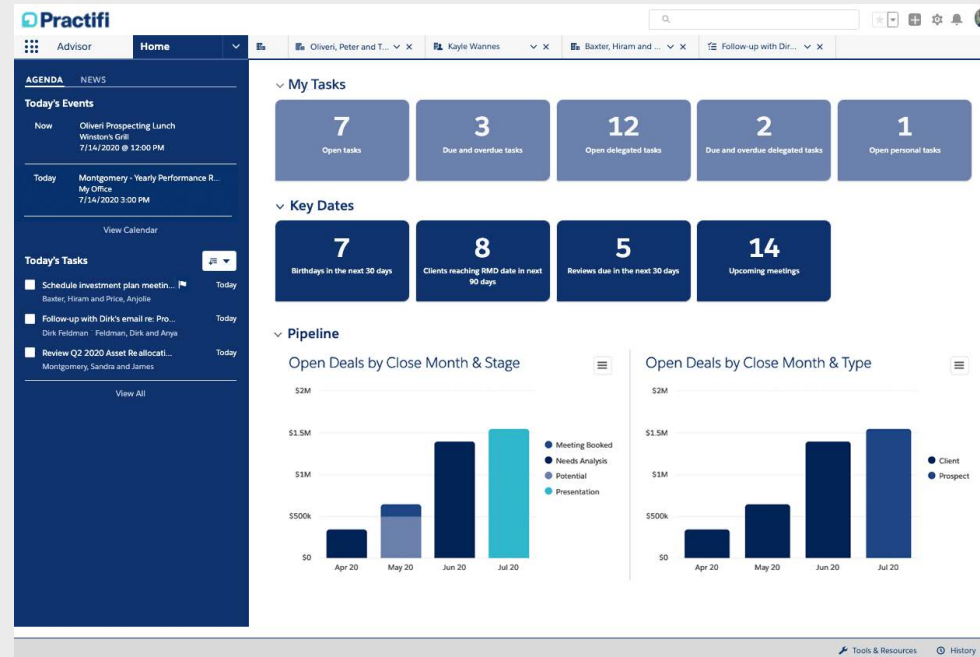
Missing badge! The type was made to stay near a badge.



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

## Color combos.





# Practifi features

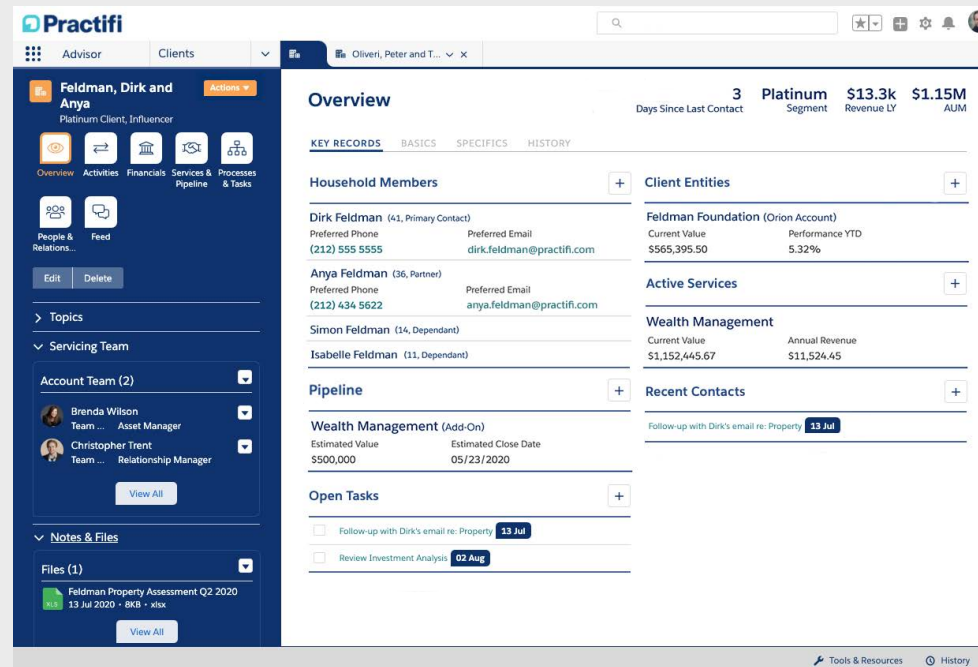
Customer expectations and compliance requirements have evolved beyond traditional CRM capabilities. In today's world, growing an advice business relies on using the right tools that bring the user's ecosystem together and enable sustainable scalability.

## Role-based apps for each team

Not everyone at your firm does the same job, so why should they work from the same dashboard? Your Advisor, Client Service, Compliance, Management and Marketing teams can all have bespoke apps to improve team efficiency, increase platform adoption and make each user feel at-home.

## Actionable dashboards

Gain insights and act quickly on important deliverables from your app homepage dashboard. View open tasks, upcoming meetings, overdue delegated tasks and more.



# Practifi features continued

## Comprehensive client records

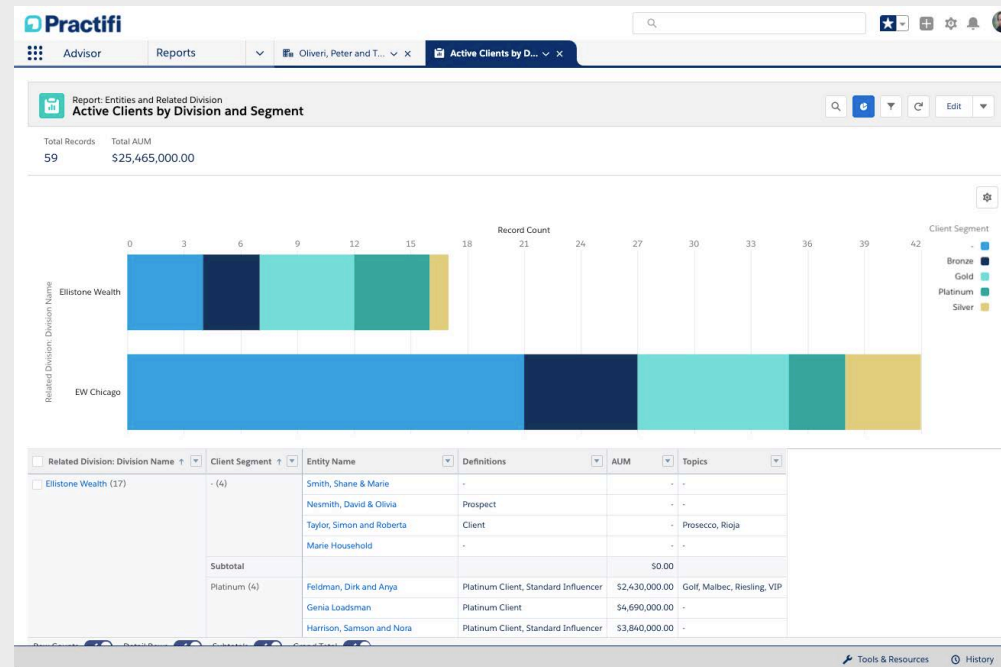
Manage your clients more intelligently and collaborate seamlessly with Practifi's client overview. Easily view household members, related tasks, active services, AUM and more. And with a live feed on each client record, team members can communicate in real time.

## Enterprise workflow automation

Why spend time delegating repetitive tasks or risk overlooking important changes when you can rely on technology to do it for you? Practifi's powerful automation engine makes task management simple. Manage key dates, send user alerts, flag compliance commitments, and more.

## Pre-built workflows

Unlock pre-built workflows with configured outcomes for discovery meetings, new account openings, annual client reviews and more. Watch how smart processes streamline collaboration and improve business efficiency.



# Practifi features continued

## Centers of influence (COI)

Extend revenue streams through deeper relationships with referral partners. Manage and segment influencers, track value and coordinate engagement from Practifi. Link complex referral relationships across individuals and entities to mitigate risks and identify new areas of growth.

## Powerful business analytics

Build reports to monitor every aspect of your business, from productivity to profitability, and client engagement to compliance. Set user, team, division and firm KPIs and track performance from wherever you are with enterprise grade dashboards and analytics.

## Your business in your pocket

Keep your business in your pocket with the Practifi smartphone app. As a 100% cloud-based platform, Practifi allows you to access client information when you need it, collaborate with your team, assign tasks and start processes on multiple devices.

# 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 been exceptional during our onboarding process. Their ability to understand our challenges and come up with solutions has been second to none. We’re excited for this long-term strategic partnership.”

**Kyle Wesley**  
Chief Digital Officer, Bleakley Financial Group



“A good CRM helps you be prepared for the day, every day. I truly believe Practifi is head and shoulders above anything we've used in the past. It's intuitive and the service level we receive from the team in Chicago has been tremendous. Unheard of with any other CRM software provider in the industry.”

**Brian Murphy**  
Founder & CEO, Pathways Financial Partners



“Practifi helps us manage stronger customer relationships, track every interaction and run common workflows across customer service, advice and operations.”

**Andrew Godfrey**  
Senior Partner & Chief Operating Officer, Mercer

# Information for media inquiries

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