Portals

The advice you provide is invaluable. Practifi Portals help amplify the value of your advice from anywhere.

While many investors navigate through multiple portals and platforms to gather the information they need to make financial decisions, Practifi Portals bring everything together into a single, integrated hub that's accessible from any device.

Practifi Portals are available to new and existing Practifi clients. To learn more, get in touch with your Client Success Manager or contact a member of our team today.

Practifi

Everything your clients need, in one place.

Today's investors expect instant access, transparency and the flexibility to make sure their financial goals are on track. The financial planning and wealth management industries recognize client portals as one solution to this need, however, many advisors struggle to find a client portal that meets the needs of the modern investor.

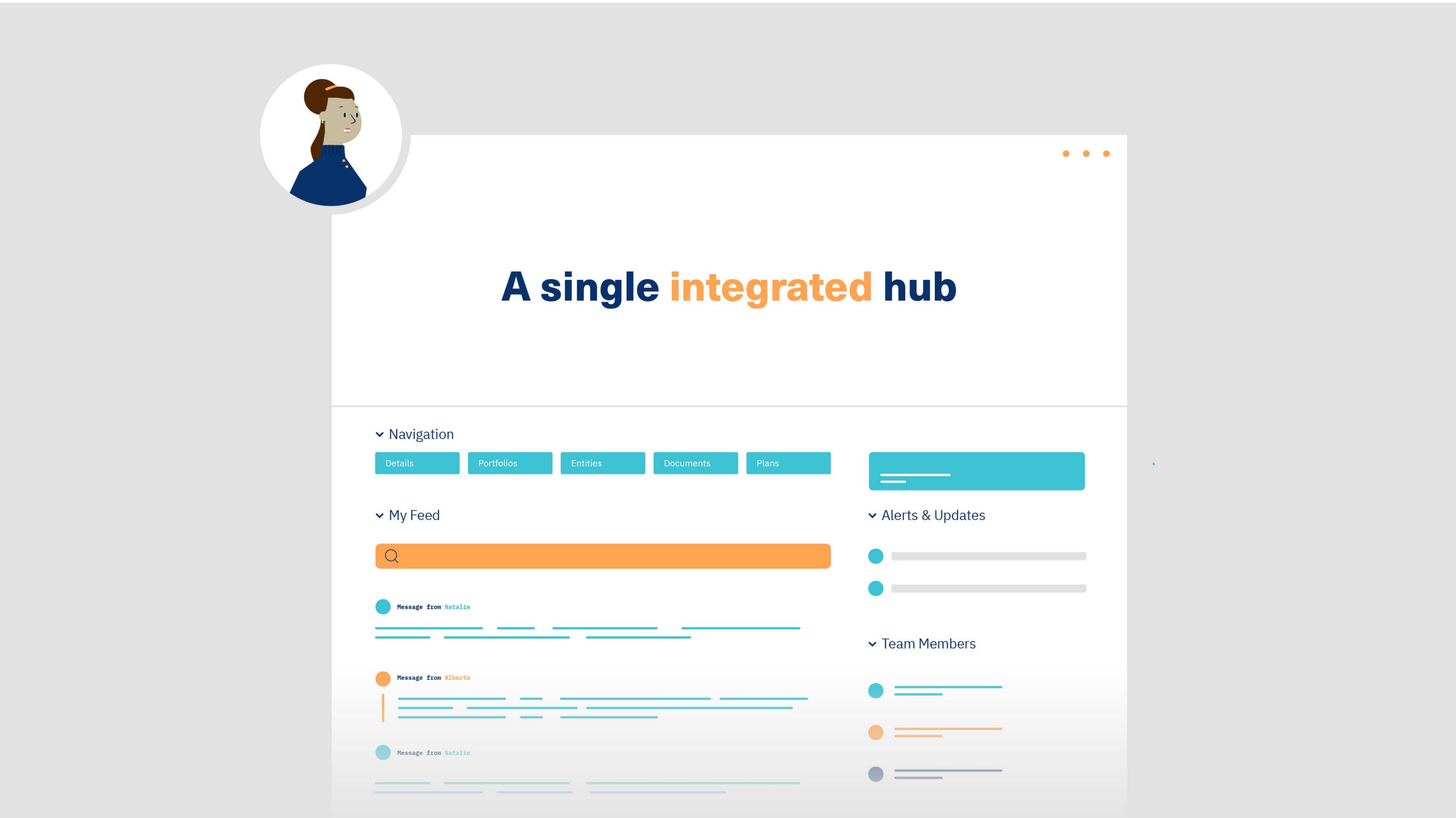
Innovative firms know the future of great financial advice relies on technological investment to meet the demands of new generations. As stated in FinancialPlanning's recent tech survey, 80% of advisors already use a client portal to engage with their clients. However, advisors are moving away from using portals provided by their BDs, custodians, and advice tools, and are instead looking for better, more integrated and UX friendly alternatives.

Unfortunately, many investors still have to navigate through multiple portals and platforms to gather the information they need to make decisions about their finances. Practifi Portals solve this by bringing together everything an investor needs into a single, integrated hub that lives in their pocket. As a result, transparency improves, engagement increases and the value of your advice is amplified.

Improve Transparency

Increase Engagement

Amplify Value



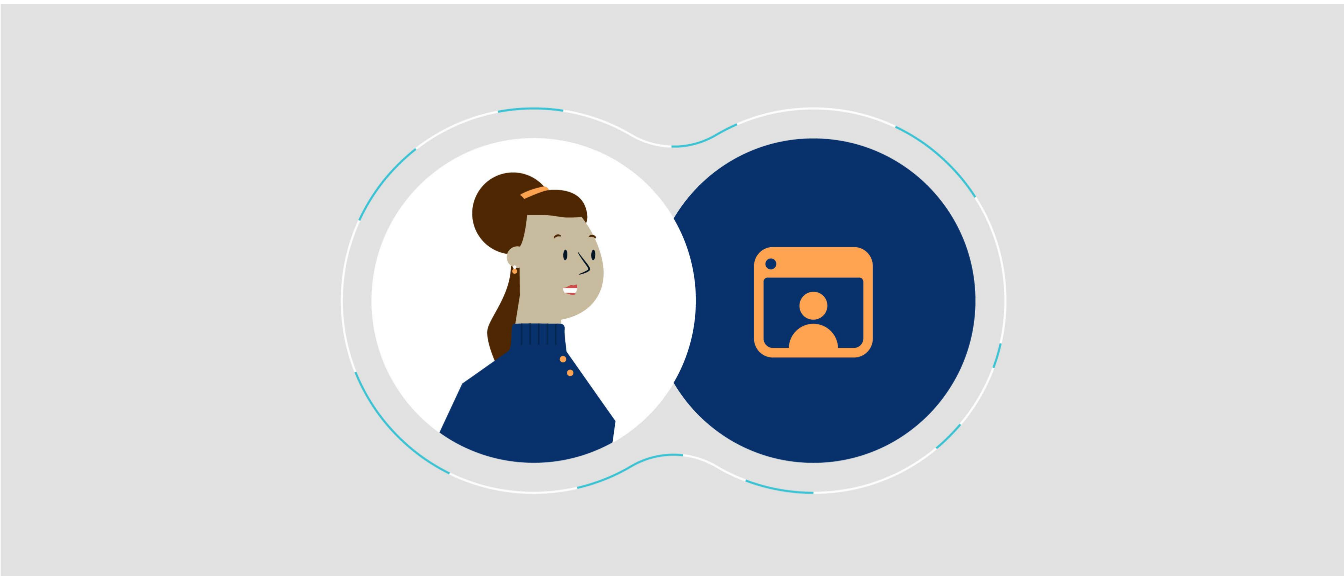
Amplify the value of your advice.

Built on Salesforce's Experience Cloud, Practifi Portals provide you the freedom, flexibility and enterprise-level technology you need to create an effective and delightful portal experience for the modern investor. Through a detailed research and implementation process, our team works closely with you to understand your firm's needs. Then, we create a portal experience to bring your client portal aspirations to life.

The advice you provide is invaluable. With features that meet the expectations of a modern investor, a beautifully crafted user interface and enterprise-level support, Practifi Portals provide everything you need to increase transparency, improve engagement and amplify the value of your advice from anywhere.

- **Account Balances**
- **Chatter Feed**
- **Asset Allocation**
- **Alerts & Updates**
- **Portfolio Performance**
- **Educational Materials**
- **Document Storage**
- **Entity Management**

> "Working with Practifi and their development team has resulted in a highly customized version of our platform that enables our business partners and clients to interact with our team in an intuitive, user-friendly way. The result has been a simple solution for a complex set of challenges that has improved our client relationships and interactions dramatically. The Practifi team has been communicative and responsive, and the process has been creative, rewarding and highly successful."
>
> **- Adam Silverman, Head of Private Mortgage, Focus Financial Partners**



Get started today.

Get in touch with your CSM
or contact a member of our team today

www.practifi.com