

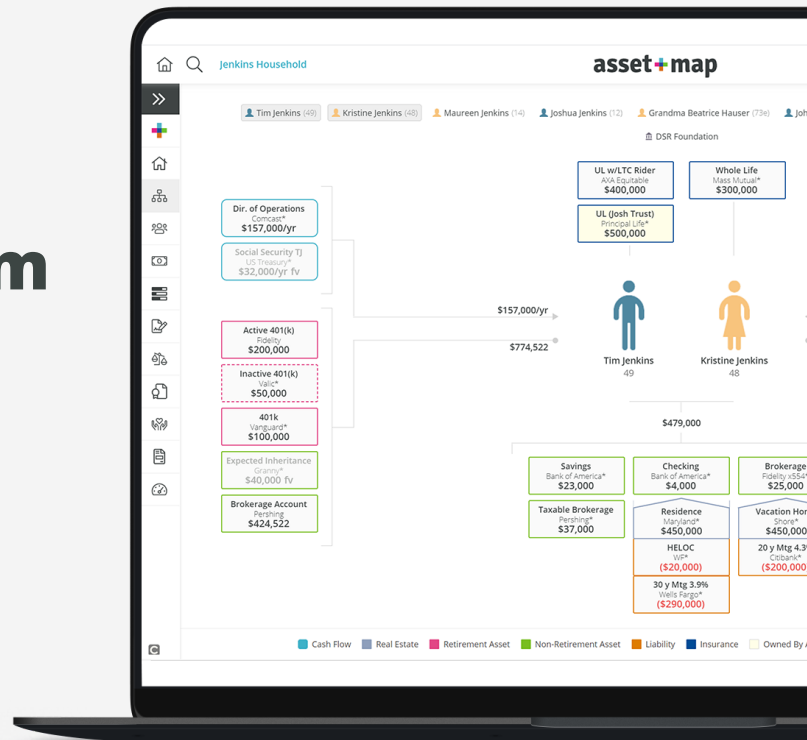
# The Adviser-Client Engagement Platform

(Now in the UK!)

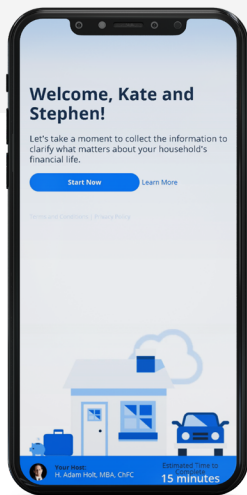
Asset-Map has been called “the financial picture that’s worth a thousand decisions.” In 15 minutes or less you have the important information about your client’s financials in one shared picture: the start of bigger, easy-to-understand advice conversations.

Let's get started with your demo:

[www.asset-map.com/united-kingdom](http://www.asset-map.com/united-kingdom)



Asset-Map Report™



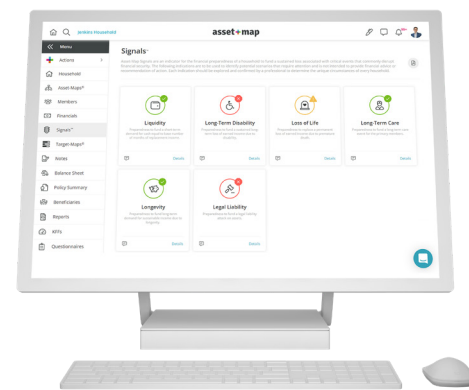
Asset-Map Discovery™

## Initial Conversations

Asset-Map is a game changer for onboarding new clients. Nothing builds credibility faster, gets to holistic advice conversations quicker, or gets clients to make decisions with more confidence.

## Recommendations & Advice

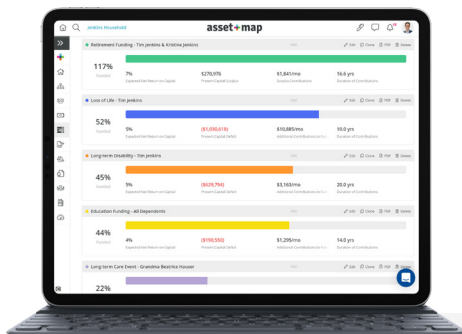
Asset-Map helps you make your point for speed-to-advice and recommendations. You can track priorities, update recommendations and review progress with your clients in real time.



Asset-Map Signals™

## Ongoing Engagement

Asset-Map keeps up with your client's financial picture, an ongoing agenda where you can track progress, update recommendations and review your relationship with your client in real time.



Asset-Map Target Maps®

## Key Benefits for Advisers:

- Advisers that use Asset-Map add an average of 38% to their yearly income
- Faster decisions means more time to put toward other clients and generating additional business
- Clients that understand you and the value you bring them creates the trusted relationships that lead to more engagement and more sales

## Why Advisers Choose Asset-Map



**Marty Higgins, CFP®, ChFC**

"I have never met an existing client or an interested prospect who is not impressed with Asset-Map."



**Molly Ward, CFP®**

"The best way to measure the value of technology is to understand what your firm would be like without it. Asset-Map is like coffee for me and my clients; it's an essential part of every day."



**Henry Swan, ChFC, CLU**

"As many tax professionals get wrapped up in the compliance side of the business and focus on accounting for events that have happened in the past – what better way to demonstrate to clients that we are focused on helping them plan for their future as well than providing them with a visual map – an asset map – that helps them understand where they've been, where they are, and where they are going."



### Highest Rated

Financial Wellness Tools 2023  
Leader  
Best Relationship  
Best Support  
Momentum Leader



Wealth  
Management.com

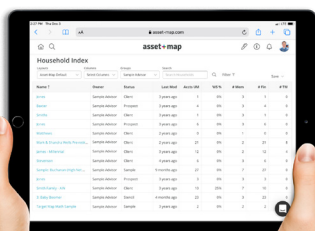
### 2020, 2021, 2022, 2023 Awards

Winner Specialized Planning (4)  
Winner Diversity Equity & Inclusion  
Finalist Financial Planning  
Finalist Tech Thought Leadership  
Finalist CEO of the Year 2022

accountingTODAY

### 2023 Top New Product:

Asset-Map Signals TM



## Asset-Map is the Adviser's Advantage

With Asset-Map, you simplify the complex, get to advice faster and earn more revenue. Schedule your demo today, to get started on more advice conversations tomorrow.

Let's get started with your demo:

[www.asset-map.com/united-kingdom](http://www.asset-map.com/united-kingdom)