

# A New Technology Platform for Investment Advisors



TXIO provides a fully managed service to help you engage with both prospects and clients. Deepen client engagement, and stay connected with prospects using a modern digital platform for financial management and planning.

## ANSWERS TO FREQUENTLY ASKED QUESTIONS / CONCERNS

### Client portals are expensive

TXIO offers an affordable subscription-based digital service. No up-front costs, no hidden fees.

### Client set-up is time consuming

Clients self-register and set-up within minutes. Because clients initiate and control the on-boarding process, you save valuable time.

### My workload is overwhelming

TXIO automates time consuming manual tasks, freeing up time to focus on higher-value tasks like helping your clients and prospecting.

### A modern digital experience is important to my clients

TXIO interfaces (mobile, web) are attractive and intuitive, with easy-to-use charts, graphics and visualizations.

### Managing client data is hard

TXIO automatically retrieves and aggregates client data, creating a 360-degree view of financial life. And we keep it up-to-date, so you and your clients can spend time where it counts: planning.

### I can't scale

Better, more efficient tools mean you can support more clients and affordably scale your business.

### Data security is a concern

TXIO is SOC2 certified, so you can feel confident knowing your clients' data is protected.

### I struggle with engagement

TXIO continuously tracks and analyzes transactional client data: e.g. spending, credit cards, transfers, other, giving you with an opportunity to engage/advise with their whole financial life.

## CAPABILITIES AND BENEFITS



View and assess a client's financial life within minutes using 360-degree view of client data



Automated management of client data



Aggregate and track all client investments in one place: e.g. stocks, funds, art, crypto, other



Broaden prospect funnel with new and growing demographics



Insights, spend analysis, budgeting, investment tracking, goals, forecasts and more



Lower Client Acquisition Cost (CAC) through platform automation



No costly and time-consuming technology integration



Reduce churn rate with tools that promote and drive daily engagement



Consumers expect app-based services for digital engagement. TXIO's innovative iPhone, Android and Web apps mean you can reach clients and prospects in real-time on any device.



TXIO is an experienced and proven team, with a track record of building and operating financial technology solutions with a global footprint.

Our proprietary technology is a multi-asset, modular software framework for digital banking, asset management and financial brokerage.



**SOC2**

Certified since 2018 (BDO auditors)



**200+**

Million trades since 2013



**Global**

Licensed by SEC, FCA, ESMA and IIROC regulated firms

# FINANCIAL WELLNESS FOR EMPLOYEES



TXIO provides a set of smart digital tools to help your employees on their journey to financial wellness. Deepen employee engagement and empower employees regardless of their salary or defined benefits.

## ANSWERING MODERN HR NEEDS

### Employee financial stress

TXIO's simple and easy to use platform provides financial education, budgeting, spending analysis and forecasting so employees have a true picture of their financial life.

### How to retain talent

By offering TXIO's financial wellness platform all employees are empowered to build a personalized financial plan regardless of their salary or seniority.

### Independent financial benefit

TXIO is independent and not a bank or advisor. We do not sell any financial products. Employees gain confidence from a truly independent benefit.

### Help staff achieve financial goals

By providing financial goal planning tools staff know you are committed to their success.

### Financial security

Increasing an employees salary without the tools to help them achieve financial health may not retain talent. Tools to help them plan for a better and brighter future will help them feel more financially secure.

### Pay scales impact benefits

TXIO's platform offers an equal opportunity to all employees regardless of salary or financial benefits.

### New benefits are hard

TXIO can easily customize and personalize content for your company and employees.

### Convenient Financial Wellness

Employees can use the platform at their own time, pace and comfort level on the web or on the go 24/7.

## FINANCIAL WELLNESS



Employees can easily assess their financial health by creating a 360 degree view of financial life within minutes.



Customized and personalized content



Secure



Give employees the tools to build their net worth



Help employees plan for personal goals



Help employees learn, plan and manage their money seamlessly



Fast, frictionless integration through SaaS service delivery



Increase employee engagement with tools that promote and drive financial well being



**TXIO's innovative iPhone, Android and Web apps means employees can budget, track their expenses, view health checks, goal plan, see their cash flow and personalized insights real-time on any device.**



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