

# WEALTH MANAGEMENT

## WM Products/Support

- MF/ETF, Annuities, Alternatives, Life Insurance and Qualified Plans
- Business Development and RVP Business Support
- Internal Advisor Sales Desk
- Advanced Sales Attorneys

## Advisory

- **Platform:** Open Architecture
- WMP - Envestnet Chassis with Enhanced Reporting Capabilities
- Internal/ Regional Sales Support
- Sales/Marketing Integration
- Advisor Managed Portfolios
- Leading Model Strategist Partners
- Separately Managed Accounts
- Unified Managed Accounts
- TPMMs

## Research

- Research Guidance Models
- Preferred MF Lists
- Market Commentaries & Rationales

## Innovation

- Digital WMP Onboarding
- Genesis Robo through advisors

## Accelerate With Advisory

- Targeted Advisory Promotion Program
- Advisory License Reimbursement
- Online Tools and Resources
- 15 City Regional Workshops
- Dedicated Education Track at WMS

## Genesis Series

- Advisor Groups' **ALL Account Solution**
- Value of Choice
- Minimums as low as \$5,500
- Low Entry Point to Institutional Management, but still appealing to Larger Investors

