



If this is how your clients want to live

then why are you giving advice like this guy?



## The Advisor Software Platform Sets the Bar for Today's Wealth Management Strategies

Advisor Software, Inc. provides a data-rich, digital advice cloud platform that utilizes patented industry-leading technology to simplify and clarify the role of today's financial professionals.

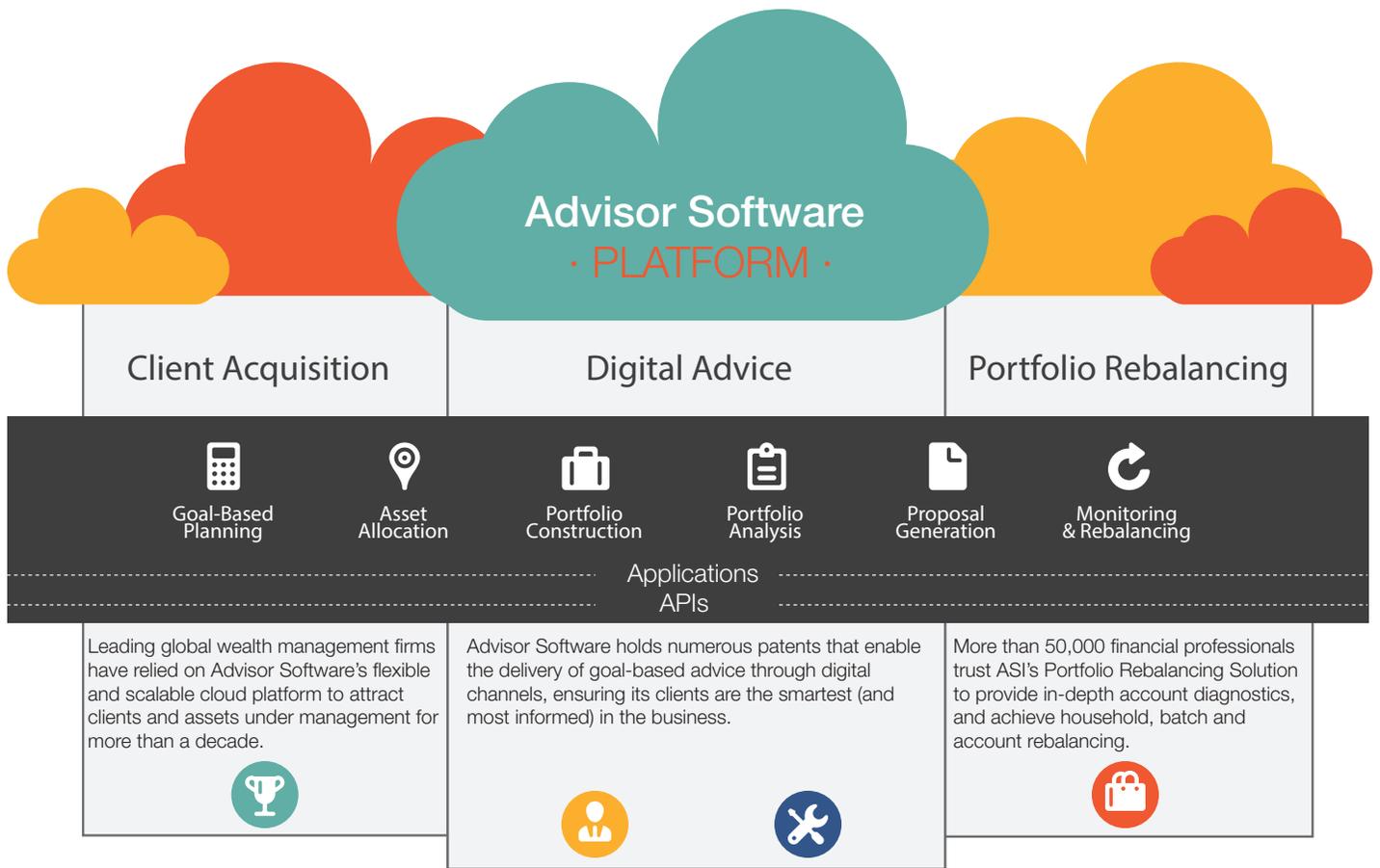
The Advisor Software suite of applications inspires conversations about goal-driven planning and investing while bringing innovation to portfolio construction and rebalancing, keeping a client's confidence and security at the forefront.

By utilizing the Advisor Software set of applications and APIs, companies are able to tailor the user-interface and user-experience for a seamless, unique client engagement.

We invite you to learn more at [advisorsoftware.com](http://advisorsoftware.com) or by calling [925.299.7782](tel:925.299.7782)

*Innovation & Knowledge Connect Aspirations to Actions*

**asi** ADVISOR  
SOFTWARE



The Advisor Software suite of applications enables financial service companies to attract and maintain assets under management with a robust, innovative platform.

## Every Generation Needs a Leader

### Goal-Based Planning

Combine financial and investment planning with intuitive advice delivery from a cloud platform.

### Diagnostics

Inspire customer loyalty by monitoring and analyzing client portfolios, ensuring goal achievement.

### APIs & Applications

Leverage ASI's platform to tailor the look, language and workflow to match any company's identity.

### Patents

Advisor Software holds numerous patents, making it a market leader in wealth management technology.

For more information visit us at [www.advisorssoftware.com](http://www.advisorssoftware.com) or follow us

