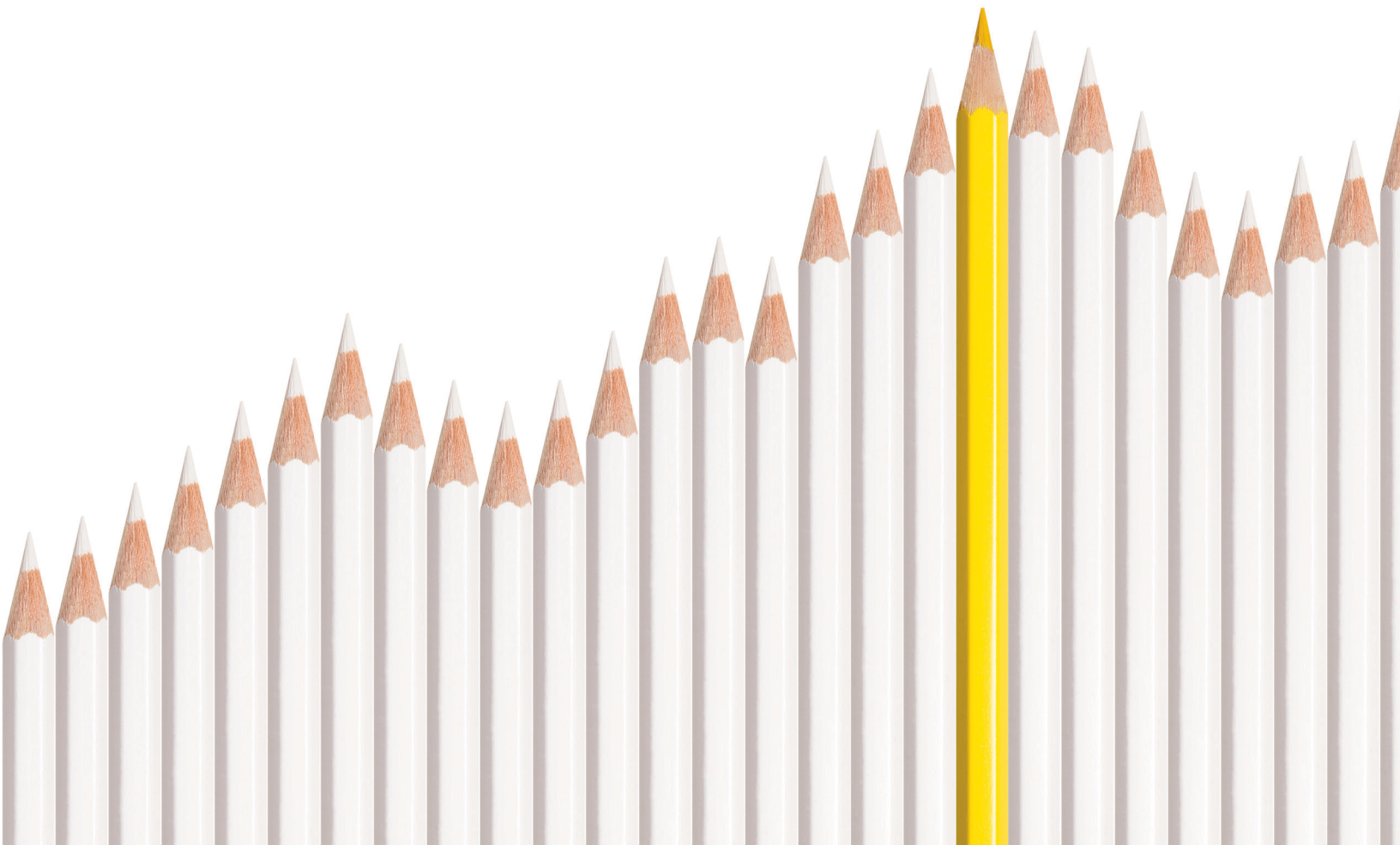




**FundChoice™**

Helping advisors build growing advisory practices  
through one, simplified investment platform.



# About *ftj* | FundChoice

*ftj* | FundChoice helps improve advisor-client relationships with simplified investment, technology, and service solutions. Our mission is to give advisors the freedom and flexibility to focus on what's really important – building positive client relationships and expanding their advisory practice. We achieve that with investment tools and an intuitive, useful and comprehensive technology stack.

## Who We Serve

RIAs

Broker Dealer Advisory Programs

Wealth Managers

**3000+**

Individual advisors active  
on our platform

**500+**

Corporate & individual  
RIA relationships

**\$10B+**

In assets entrusted  
through our platform



## Investment Resources

We provide comprehensive investment resources to help you easily accommodate a wide range of clients and their unique investment needs.

- Advisor portfolio modeling
- Selective network of due-diligence approved third-party money managers
- Unique portfolio diversification process (Market Movement Strategies - MMS)
- Proprietary risk scoring that considers market participation attitudes
- Extensive no-load fund list (+2700)
- Custody through TD Ameritrade
- No account minimums
- Tax managed investment options
- Separately Managed Account options for high-net-worth clients
- Highly accessible service teams

# Supporting Technology

We deliver investment technology that is intuitive and useful to help streamline your business – from client onboarding to account reporting – and minimize your daily challenges.

- Easy-to-use proposal system
- Private labeling options
- Web-based research and trading
- Automated fee billing
- Portfolio performance and tax reporting
- Online service request and tracking system
- Advisor and client mobile app
- Data feeds to portfolio aggregators
- Laser App connectivity
- Redtail CRM integration
- DocuSign integration
- Advisor-led robo technology



Reduce the barriers to your business growth today, with one, simplified investment platform.

Contact us to learn more.

[www.ftjFundChoice.com](http://www.ftjFundChoice.com)

[sales@ftjfundchoice.com](mailto:sales@ftjfundchoice.com)

**800.379.2513 Option 5**

*For professional use only. Not intended for public distribution.*



2300 Litton Ln. | Ste. 102 | Hebron, KY 41048  
p 1.800.379.2513 | f 1.859.426.2050  
[www.ftjfundchoice.com](http://www.ftjfundchoice.com)

1278-FTJFC-12/28/2018