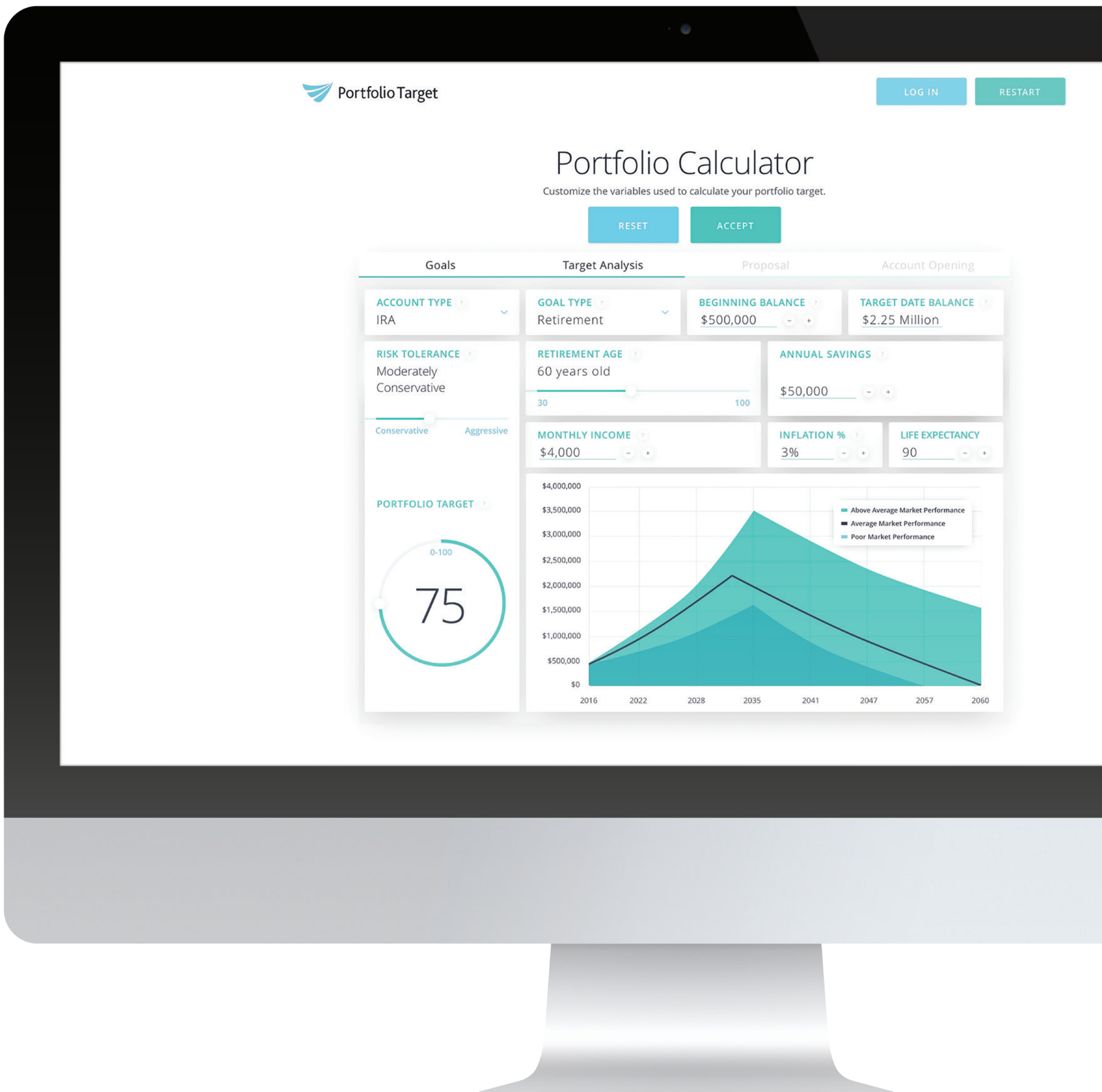
Portfolio Target

Your Relationship. Your Strategy. Your Digital Solution.



Powered by ftj | FundChoice™

Connect with Clients

Why it Matters

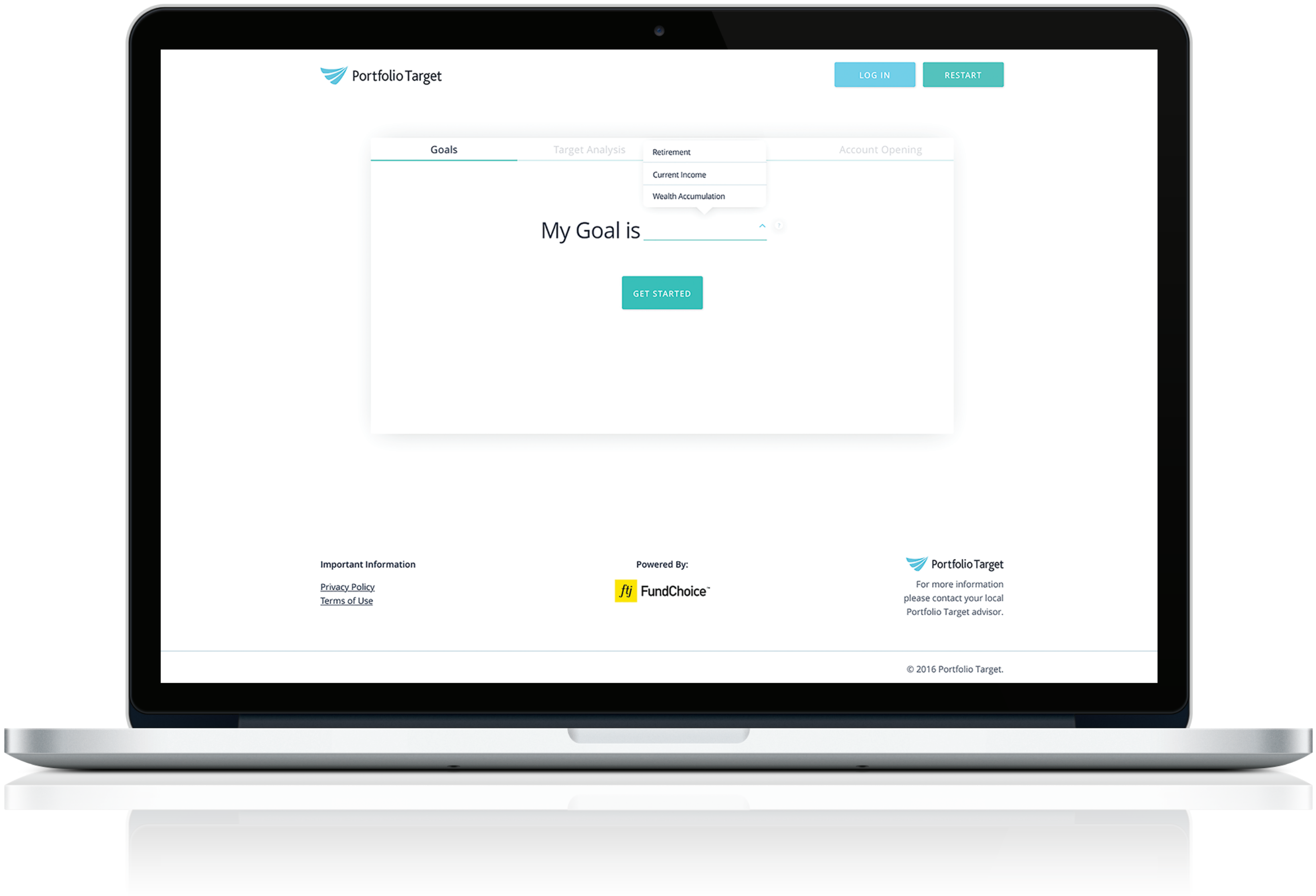
Portfolio Target helps advisors compete with direct-to-consumer "robo-advisor platforms". Using user-friendly technology and data, you can easily connect to clients searching for next-generation investment services.

Features

- 100% Digital User Interface
- Private Labeling
- Custom Model Allocations and Portfolios
- Automated Trading and Rebalancing
- Paperless Account Opening with DocuSign Integration

Benefits

- Increase relevance in an increasingly digital marketplace
- Improve overall client experience
- Streamline onboarding to secure more business
- Access strategist models
- Elevate your brand with private-labeling
- Expand business flexibility with robust investing solutions
- Manage relationships that might not otherwise meet your minimum asset requirements



What it Delivers

As an advisor led digital advice solution, Portfolio Target is designed to deliver a fully digital investment experience to your clients. It combines our client facing technology with financial advisor expertise, selecting and directing the investments to help clients reach their financial goals.

Why Digital Advice Solution?

Access an array of third-party strategists and mutual fund solutions to instill your investment philosophy and more easily select right-fit model allocations for each investor.

With less time consuming research and reporting, you gain the freedom to focus on the important things – building relationships, educating clients and growing your business.

Your Digital Advice Solution

How it Works

With Portfolio Target, you gain access to a fully branded digital solution, allowing you to assess, educate, and onboard clients in one streamlined process.

1. Guide clients to your branded Portfolio Target website.

2. Your client indicates their investment goal: Retirement, Current Income, Wealth Accumulation

3. Clients are walked through a series of investment lifestyle questions.

4. Portfolio Target calculates a personalized score to identify investment options.

5. The client enters your unique advisor code and their contact information.

6. A proposal with your recommended investment portfolio and fee structure is generated.

7. Clients open an account electronically and sign digitally with DocuSign.

You get back to building relationships, serving clients, and growing your business.

Implementation

Get Started

Launching your own digital advice solution to streamline and strengthen your business growth is simple. Login to the *ftj* | **FundChoice** Advisor Portal and select Portfolio Target to register and get started.

Registration Process:

- Build Your Models
- Set Your Fees
- Choose Your Story - Utilize Market Movement Strategies or Choose Your Own Investments

After Registering You Will Receive:

- A custom PortfolioTarget.com URL to be hosted on your website
- A custom Portfolio Target Advisor Code
- A tailored PortfolioTarget.com portfolio builder, complete with your brand and fee structure*

**Private labeling requires approval from your advisory firm.*

Give your business the technology to compete in our digital market.

To learn more about Portfolio Target, please visit www.ftjFundChoice.com/Portfolio-Target or contact the *ftj* | **FundChoice** Sales team at sales@ftjfundchoice.com or 800.379.2513.

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