Portfolio Target

Your Relationship. Your Strategy. Your Digital Solution.

Built to Exceed Your Clients' Digital Demands

Powered by ftj | FundChoice™

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Whether you are looking to attract next-generation investors or expand your digital offering for all generations, Portfolio Target is designed to amplify your prospects and clients' technological experience. ftj | FundChoice selected advisor technology and marketing leaders AdvisoryWorld, Orion Advisor Services, and Mineral Interactive to help its in-house team build this one-of-a-kind online tool. In this case study, we'll dive into how ftj | FundChoice conceptualized an all-new, state-of-the-art financial advisor-led digital advice solution.

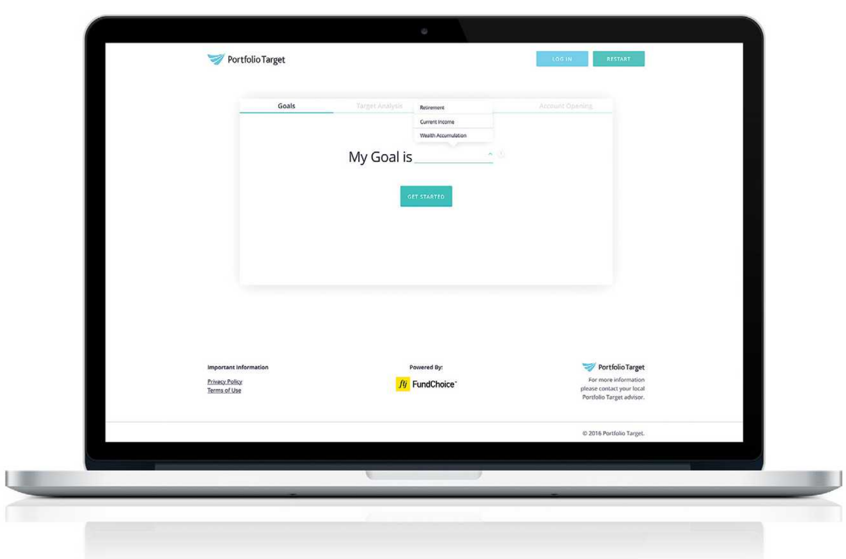
Conceptualizing the Solution

Today, clients expect access to information at all times, as well as control of their digital experience. These heightened client expectations—combined with the rise of the robo advisor— are causing financial advisors to search for a digital solution that acts as an extension of themselves. *ftj* | **FundChoice** set out to create the type of technology that will fully support financial advisors in today's highly competitive and fast-changing marketplace.

Assessing the Digital Advice Landscape

New advisor-led, digital advice solutions enter the advisor technology landscape daily. This rapid pace of product innovation leaves little room for developers to fully evaluate current offerings before attempting to build technology that is better than the last version.

To create a solution that was truly an extension of an advisor, *ftj* | **FundChoice's** team spent years evaluating all the modern digital advice offerings and speaking with advisors directly to assess their unique needs. *ftj* | **FundChoice** ultimately chose to create their own digital solution that would allow for strategist-led and custom portfolios, offer thorough risk analytics, and provide extensive opportunities to private label the technology along with supplemental marketing and PR materials to help advisors promote Portfolio Target to their prospects and clients.



Creating the Team

During its extensive discussions with advisors, *ftj* | **FundChoice** learned that they place a premium on knowing their technology partners first-hand, as there are certain technology providers that they trust over others. *ftj* | **FundChoice** chose to call in these providers to work side-by-side with their in-house project team and build a custom, advisor-led digital solution. *ftj* | **FundChoice's** select team included:

ORION

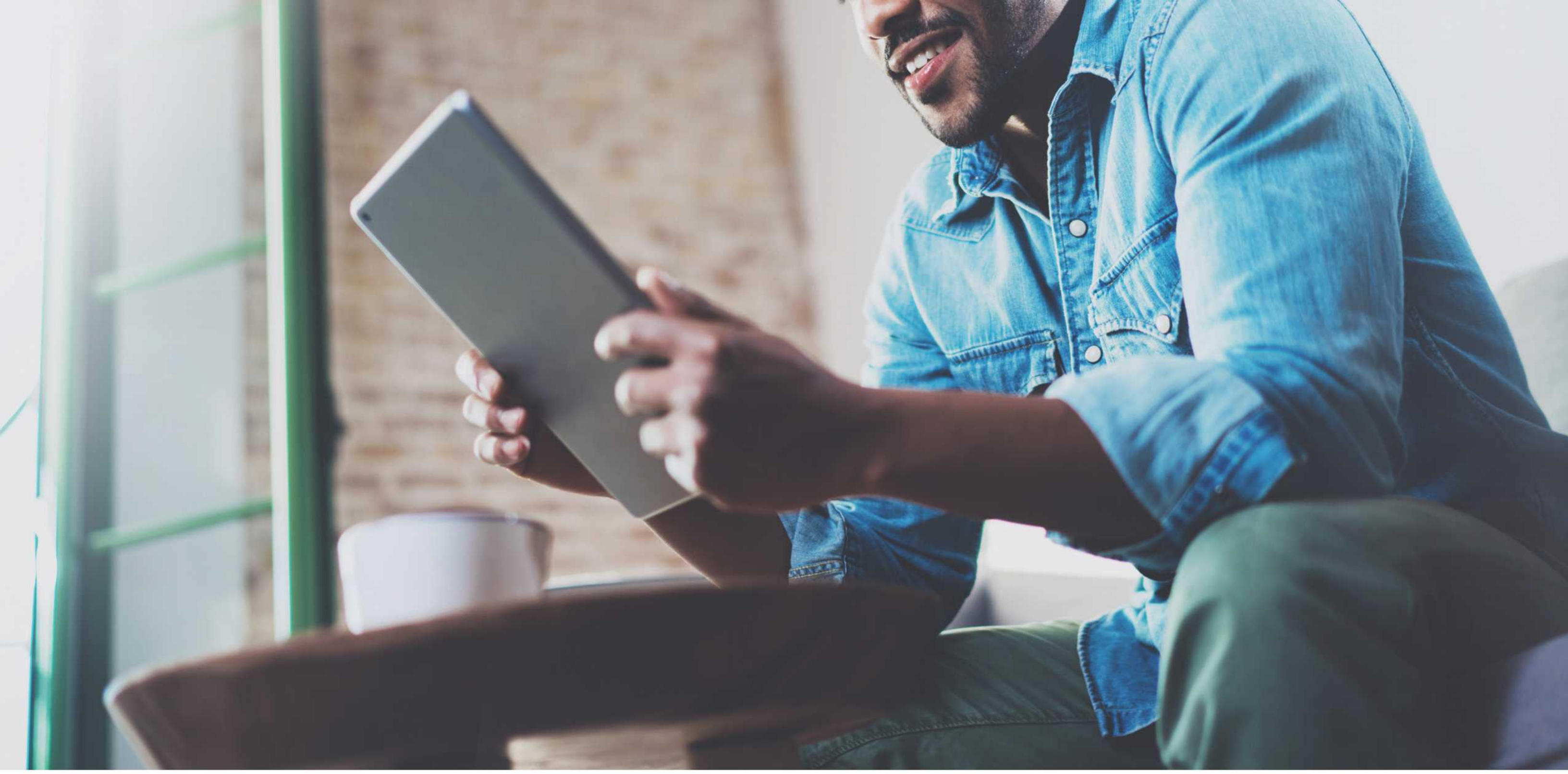
Orion Advisor Services, LLC (Orion) is the premier portfolio accounting service provider for independent, integrated advisors. Created by advisors, for advisors, the firm has unique insights into the advisory profession because of its origin from an investment advisor in 1999. Today, Orion's technology solutions empower more than 1,200 advisory firms with total assets under administration in excess of $500 billion, from more than 1.9 million individual accounts.

ADVISORYWORLD FINANCIAL TECHNOLOGY

AdvisoryWorld is the leading provider of investment analytics, portfolio modeling and proposal generation technology for the financial services industry. Their technology is delivered via off-the-shelf web applications, API, and Professional Services. Founded in 1987, AdvisoryWorld is headquartered in Los Angeles, CA, and currently services over 30,000 investment professionals nationwide.

mineral

Mineral employs a diverse team of creative professionals who are passionate about partnering with client-focused firms looking for exceptional custom marketing solutions. Solely focused on serving those in financial services, Mineral provides custom digital strategy and consulting, website design, user interface design, paid media, end-to-end animated and live video production, and creative content to fulfill inbound marketing strategy.



Making Portfolio Target

With plans in hand, ftj | FundChoice met with their newly formed Portfolio Target project team and created a workflow for the development of this new technology. First, ftj | FundChoice focused on the seamless incorporation of its popular platform for optimal portfolio construction, Market Movement Strategies, and the ability to create custom portfolios were immediately addressed and coded into the workflow.

ftj | FundChoice then had Mineral Interactive kick off the process with content, branding, and design services to help create a customizable user interface that could serve the needs of the individual advisors who would ultimately use the new solution.

Once Mineral's design and content teams helped cultivate ftj | FundChoice's ideal front-end experience, overall look and feel, user workflow, and message to communicate Portfolio Target's value proposition for the industry, it was time for AdvisoryWorld to leverage their expertise. AdvisoryWorld stepped in to assist with the creation of Portfolio Target's custom lead acquisition, portfolio modeling, and risk and goals based proposal generation. As an existing partner of ftj | FundChoice, AdvisoryWorld's work further supported the core competencies of the ftj | FundChoice platform.

Completing the process, ftj | FundChoice called on Orion Advisor Services to develop a unified managed account maintenance system, a new account opening feature, and wrapped in back-office services to form the data foundation of Portfolio Target and ensure the service had a rock-solid infrastructure behind it.

After two years of product development, market testing and fine-tuning, ftj | FundChoice publicly launched Portfolio Target in June of 2017, having successfully created a technological extension of an advisor.

Portfolio Target

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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.

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

How it Works

- Advisors complete Portfolio Target set-up building model portfolios (using third-party strategist offerings or creating their own custom portfolios), setting their fees, choosing their investment story, and completing all private labeling settings.
- Advisors guide their clients to their self-branded Portfolio Target website via a link on the advisor's website or a given URL.
- Client digital experience begins with the client indicating their investment goal - retirement, current income, or wealth accumulation.
- The client answers a series of investment lifestyle questions.
- A proposal with the advisor's recommended investment portfolio is generated for the client's viewing.
- The client opens an account electronically, signing digitally with DocuSign.

For more information on Portfolio Target, 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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