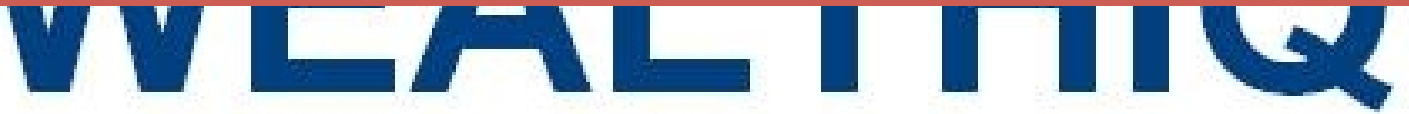


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The logo for WealthIQ, featuring the word "WEALTH" in a bold, blue, sans-serif font, followed by "IQ" in a similar font but with a stylized "Q" that has a circular arrow around it.

WealthIQ offers advanced configurability allowing your software to match your business rules instead of forcing your business rules to match your software.

With WealthIQ you can:

- Accelerate client acquisition and onboarding
- Capture and retain assets with persuasive client presentations
- Improve performance and efficiency
- Ensure compliance with firm standards
- Maximize advisor adoption rates with an easy to use interface
- Leverage home office assistance to advisors through Service Bureau
- Experience the value of a tailored solution at an out-of-the-box price

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