

WEALTH, ORCHESTRATED

TRANSFORM  
YOUR  
PRACTICE



# W E A L T H , O R C H E S T R A T E D

Transform your practice,  
outclass the competition,  
and consistently  
exceed client expectations.



# W E A L T H , O R C H E S T R A T E D

## UNLOCK POTENTIAL FOR YOUR CLIENTS

For the first time, everything a professional advisor needs to know about clients can be accessed in one place.

- All their relevant information—their financial, legal, business, and domestic affairs—is consolidated in a secure online vault.
- Clients and their teams of trusted advisors are connected confidentially through a real-time, online dashboard.
- Full portfolio management capabilities are available to financial professionals.



# W E A L T H , O R C H E S T R A T E D

StradPro is revolutionary software that empowers a professional advisor (tax, legal, financial, insurance, etc.) to transform their office into a Virtual Family Office and unlock potential for their clients.



# WEALTH, ORCHESTRATED



Long-term success is fully realized only when wealth is orchestrated to focus on the needs of a family as a whole.



W E A L T H , O R C H E S T R A T E D

## YOUR VIRTUAL FAMILY OFFICE

Designed by advisors for advisors,  
StradPro allows for greater strategic insight,  
collaborative decisions, and  
enhanced outcomes for both clients and advisors.



# WEALTH, ORCHESTRATED

## BENEFITS TO YOUR CLIENTS

- Highly personalized advice based on real-time circumstances.
- Maximized potential through strategic, long-term planning rather than reactive decisions.
- Ease of mind offered by a team approach.
- Continuity through unsettling life transitions like cognitive decline, loss of head of household, and succession to the next generation.



# WEALTH, ORCHESTRATED

## BENEFITS TO YOUR PRACTICE

- Unique brand differentiation and competitive advantage.
- Save time through streamlined information gathering.
- Build stronger client relationships.
- Accelerate growth by seamlessly networking with clients' other professionals.
- Better ability to connect with and retain next-generation heirs.





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## THE PRIVATE FAMILY OFFICE DIFFERENCE

### BENEFITS OF HAVING PRIVATE FAMILY OFFICE

- Multi-disciplinary team shares vision of family's goals
- Comprehensive, real-time updates to family's changing circumstances
- Collaboration increases insight and maximizes potential
- Assists family's decision-maker and survivors

1

2

3

4

### DRAWBACKS OF HAVING UNCOORDINATED ADVISORS

- Multiple independent professionals with different priorities
- Limited flow of information
- Insular, reactive approach can overlook opportunities and vulnerabilities
- Lacks centralized knowledge and guidance to support cognitive decline or loss of head of household

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## EXCLUSIVE BENEFITS FOR FINANCIAL ADVISORS

- Greater profit—StradPro’s proprietary portfolio management system eliminates the need for costly third-party managers or investment products.
- Efficiently meet “Best Interests” regulatory requirements.
- Increase AUM through account aggregation that gives complete insight into client assets.
- Expand business with customizable suite of premium marketing materials.



# W E A L T H , O R C H E S T R A T E D

If you're not offering clients the caliber  
of service a Virtual Family Office provides...  
who will?

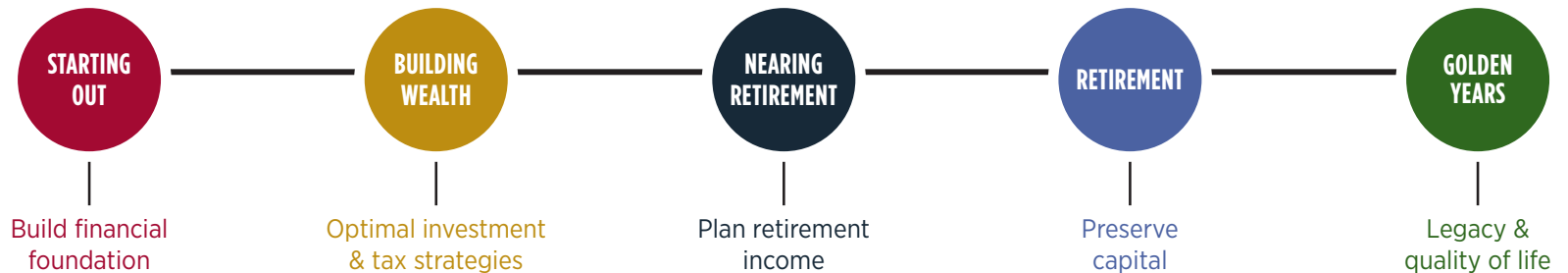
And where will that leave you?



# WEALTH, ORCHESTRATED

StradPro allows you to effectively position yourself as a family's CFO—and become their go-to advisor for all strategic financial and life decisions.

## FINANCIAL LIFE STAGES



For more information, please call 919.741.6104.  
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**StradPro 2.0<sup>SM</sup>**  
The Stradivarius  
of financial software