

Eugene Grey, Financial Advisor



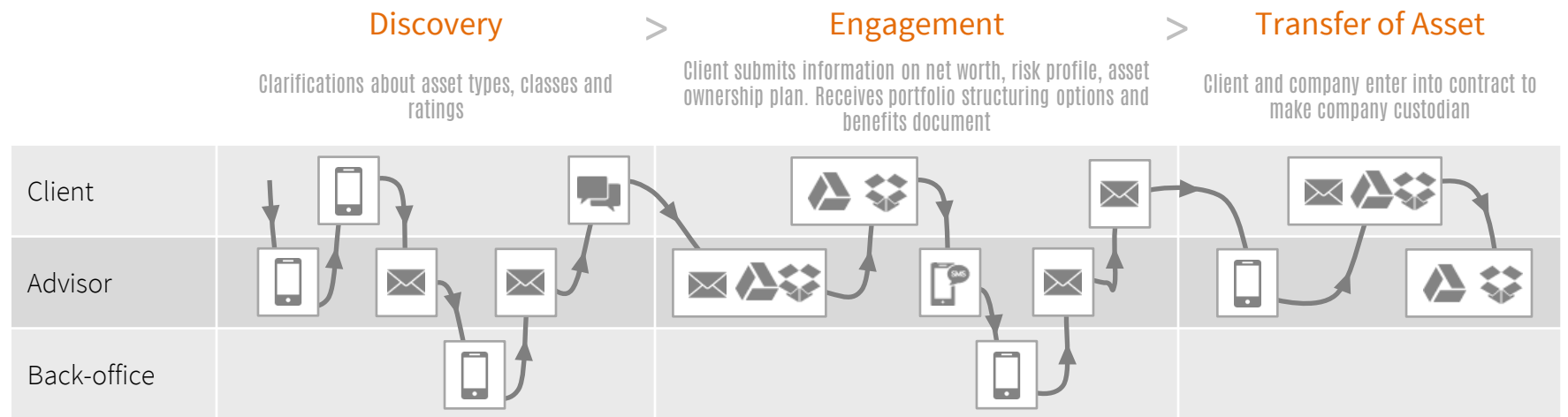
“Wish it was easier to engage my clients.”

## ASSET ACQUISITION TODAY

This is too cumbersome!

Oh, I can't find where I put the form

Where do I find the trail of conversations & files?

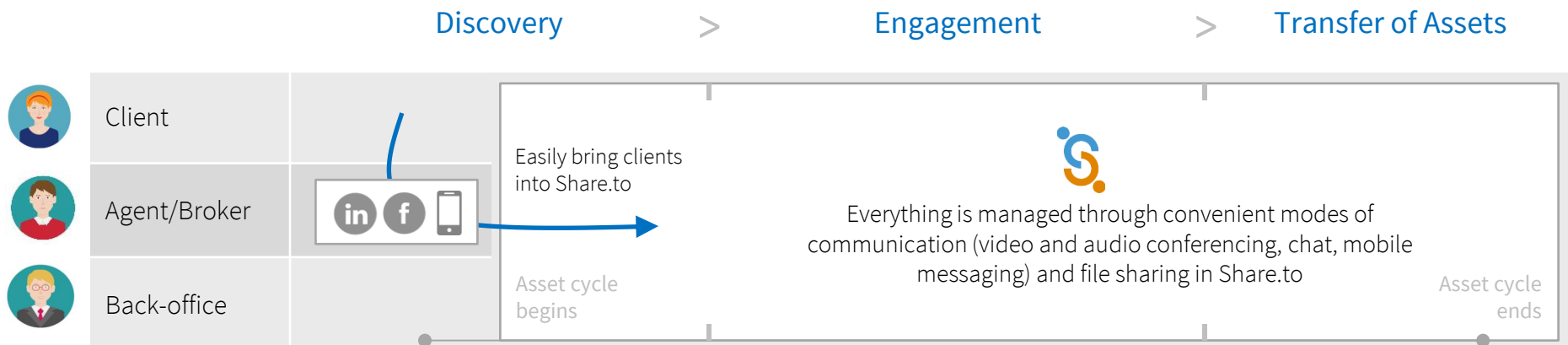


### THE OUTCOME

Information passes through as many as 7 tools

- LACK OF TRANSPARENCY
- DISENGAGED CLIENTS
- LONGER CYCLES
- REGULATORY ISSUES

## ASSET ACQUISITION WITH SHARE.TO



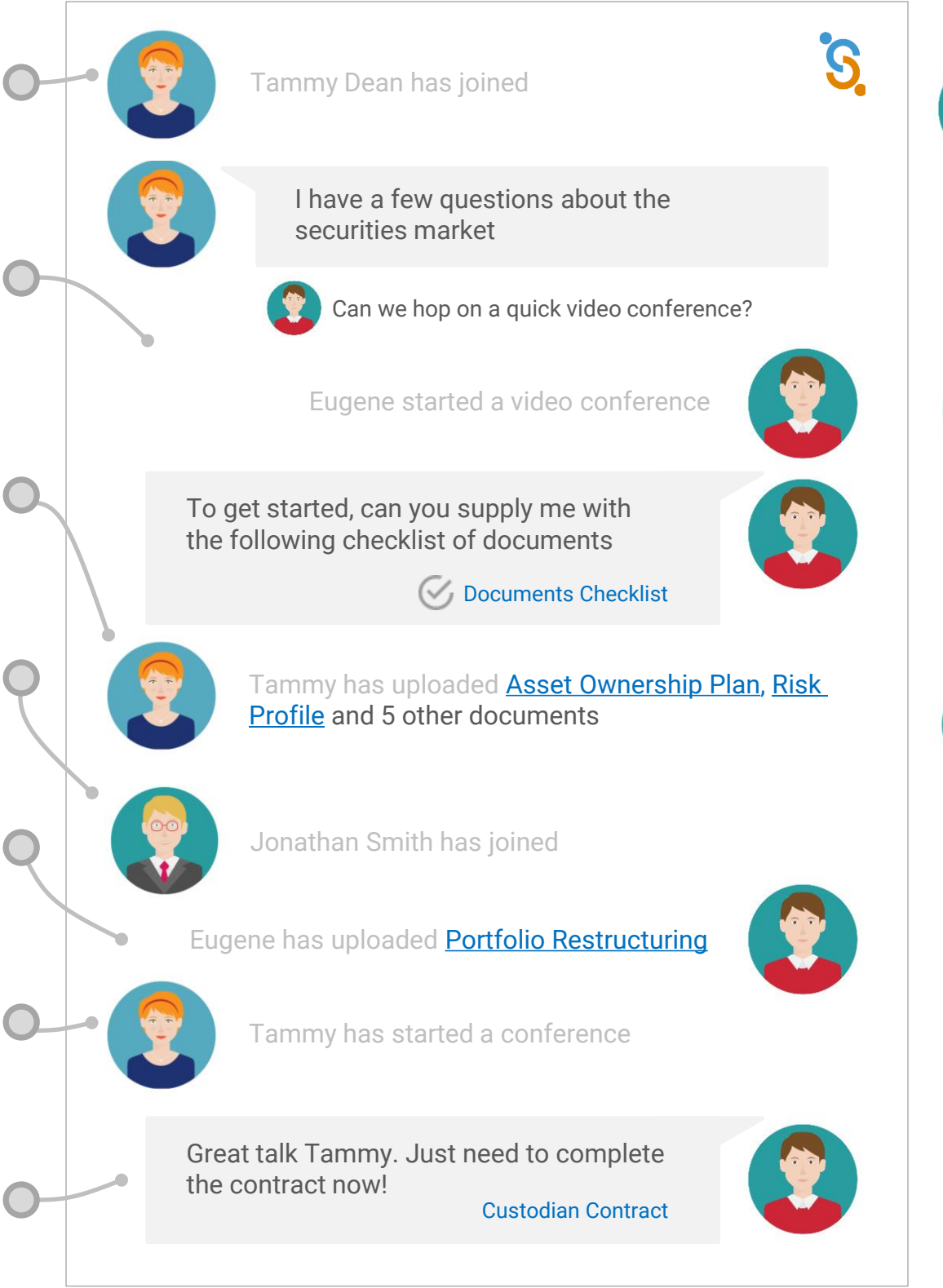
### THE OUTCOME

Single place to interface with client & record info

- MOBILITY
- TRANSPARENCY
- ENGAGEMENT
- CENTRALIZED RECORDS FOR COMPLIANCE

# Asset Acquisition enabled by Share.to

- Financial Advisor invites clients into "Share"
- Advisor gives answers about imminent market & industry impacts using preferred communication channels  
*Mobile chat, video/audio conf, web chat*
- Advisor asks client to provide checklist of documents about net worth, risk profile, asset ownership plan etc.
- Advisor invites back-office audit team member to go through documentation
- Based on Client's requirements Advisor submits portfolio structuring options and benefits document
- Client and Advisor go over documents together for final clarifications
- Advisor submits contract for appointment of his firm as custodian of client's assets



## Benefits for advisor

- Engage clients however they prefer
- Manage information centrally
- Be mobile
- Shorten acquisition cycles



## Benefits for client

- Get a transparent view of the entire acquisition process
- A single place to get all answers
- Simplify information sharing



## Benefits for financial firm

- Data security and integrity
- Auditability through archived communication and documentation\*

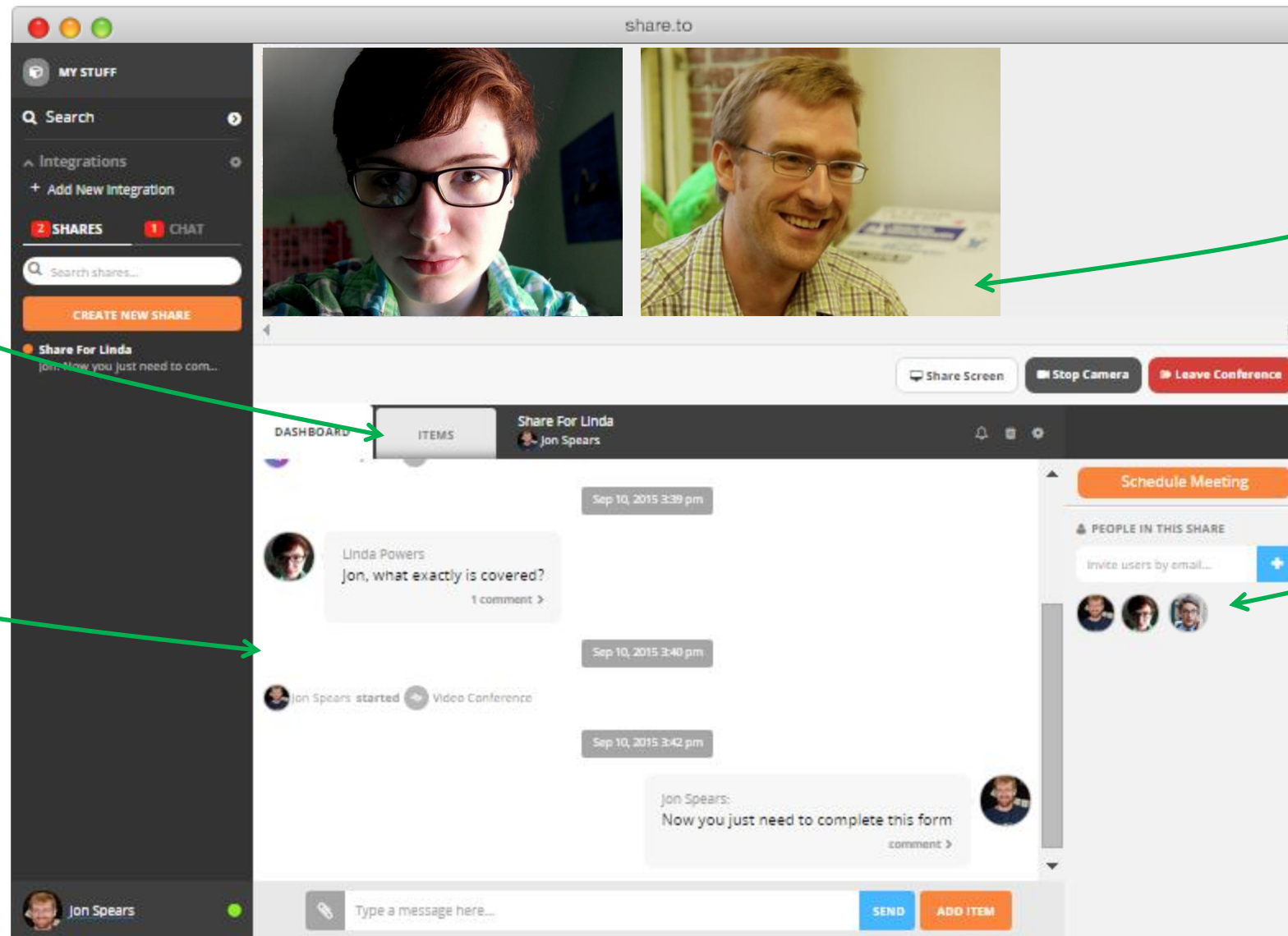
\* Conference recording coming soon in Q1 2016



Any device

# A first look at Share.to

Manage entire asset acquisition cycle in one place



One stop for sharing information

One stop for all your conversations

Communicate with the most convenient means

Involve anyone – underwriters, brokers, backoffice – as you go.

[www.share.to](http://www.share.to)