



ALPHA REPORT TITLE	REPORT DESCRIPTION
Advisor Life Cycle - Retail Advice Model	Enable a single advice channel that offers unique services to an indie Advisor, based on the stage of their business, from start up to succession.
Service Centric - Retail Advice Model	Diversify your retail advice model from product distribution focus, to one focused on offering profitable services to the retail advice marketplace.
Mass Market - Retail Advice Model	Implement a profitable, scalable full service retail advice model to materially penetrate the unique & underserved mass market.
Bionic Family Office - Retail Advice Model	Leveraging innovative concepts, implement a first mover family office retail advice business model to more profitably service the UHNW client market.
Agency Wellness Model - Retail Advice Model	Break the mold between traditional agency and retail advice models. Enable a truly full service, holistic and highly profitable retail wellness model.
Advice Centric - Retail Advice Model	Implement an advice centric model premised upon a cafeteria style service offering and graduated equity ownership, payout and segmented services.
Advice Evolution - From Product, To Service To Funding	As AUM based margins compress, we offer a roadmap to transition from your retail advice model from product, services to funding focus.
Next Generation Vendor Management	As marketplace increases it's dependency on third party service vendors, we offer a forward thinking vendor management model to drive EBITDA.
Mitigating Fiduciary Risk Thru Big Data/Analytics	Leverage the regulated, non regulated big data marketplace and enable immediate opportunity to automate suitability & fiduciary risk assessment.

