



Fusion Elements

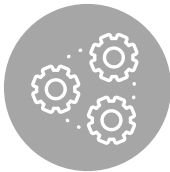


OPERATIONAL TECHNOLOGY

DESIGNED TO WORK FOR YOU

The Fusion Elements platform is your single portal for all of your firm's operational needs, and the open architecture to allow you to operate the way you want.

This provides advisors the end to end support needed to attain true operational efficiency. Owning your process means less time, less training, less need for support, and more consistency and efficiency, no matter what else changes.



END-TO-END SUPPORT

Audit Support, New Account Opening/Account Servicing, CRM Integration, Transition Support Paperless processing and signature capabilities, Payables to Audit, Third Party Money Management all client service operations, secure document storage, sales support, reporting, fee billing, compliance oversight, marketing management, account allocation, and anything else you can think of. All of your Operational Processes, tied together in one platform.



OPEN- ARCHITECTURE

The open architecture design means you can keep your CRM, your file storage service, and everything else you and your staff are already comfortable with. We can connect with over 1,200 different applications that you may already use for your business, or will use in the future. Consistency, ease-of-use, and never having to retrain your staff? That's the open architecture difference.



REDUCE NIGO'S

Elements reviews all information prior to creating any paperwork to find missing fields, email and address validity, and save drafts to help increase accuracy on the first attempt, and reduce NIGO's (to less than 3%). Since it works with your CRM's, custom forms, and more, this information is imported automatically, leaving less room for typos.

Fusion Elements Operational Technology allows us to act as the SUPERPOWER hidden within your team.

READY TO EXPERIENCE FUSION? WWW.FUSIONCM.COM