

## Fusion Capital Management Adds Over \$1 Billion in AUA This Year with Fusion Elements, an Open-Architecture Technology Platform Empowering Advisors with Operational Alpha

### *New Platform Gives Financial Advisors a Single Solution for All Operational Needs*

DALLAS, TX – October 20<sup>th</sup>, 2018 – [Fusion Capital Management](#), a technology and turn-key asset management platform headquartered in Dallas, TX, has been making waves with its new Operational Technology Platform, “Fusion Elements”. In response to heightened industry demand for new and powerful advisor-operations technology, Fusion Elements was developed to meet and exceed advisors’ expectations in both operational efficiency and the overall quality of current advisor-tech offerings. Elements has helped Fusion Capital Management capture over a billion dollars in new contracts for their technology in just eight months.

Fusion Elements empowers advisors with operational alpha – excess capital and time once reserved for operations and back office support that can be reallocated to front office activities – greatly increasing an advisory firm’s growth potential. With its multi-custodial integrations and e-signing capabilities, Elements turns the complex tech-stack of today’s advisory business into a simplified platform providing increased operational alpha for advisors and their staff. Fusion Elements live release [key features](#) include,

- **Single Sign-On for Multiple Financial Advisor Software Systems** including Service Portals, Orion Advisor Services, CRM System of Choice, and Cloud-Based File Cabinet
- **Front Office Solutions** include Fusion Manager Exchange Integration providing Up-To-Date Information, Outlooks, Market Commentary and Fact Sheets from Money Managers, and Fusion Marketing Suite Integration providing Access to Advisor Blog System, Email Marketing System, and Website Editor Program
- **Middle Office Solutions** include Audit Support with Audit File Creation, Updates to Beneficiaries, Ongoing Portfolio Risk Analytic Software via AdvisoryWorld’s SCANalytics, and Third Party Money Management with Direct Trade Requests to Money Managers and Fusion Trading Team
- **Back Office Solutions** include New and Multiple Account Opening with eSignature Capabilities and Automatic Progress Updates to Clients, Transition Support with Paperless Processing, and Ticketing and Ongoing Tracking of Progress
- **Integrations with Over 1,000 Advisor and Office Applications** allowing advisors to customize their platform with the applications and technologies they prefer.

Fusion Capital Management offers a true turn-key, technology-driven asset management platform. Fusion Elements drives a robust and vetted asset management offering that includes 75 investment strategies from the industry’s top money managers. The money managers are vetted through one of the leading providers of investment consulting services in the country, allowing advisors to fulfill their fiduciary obligations and enact their [investment philosophies](#).

“We created Fusion Elements to drive efficiency in financial advisors’ practices,” said Ryan Borer, Founder and President, of Fusion Capital Management. “We’ve seen how a poor operational process can impede the success of even the best advisor, and we aimed to remove that timely and costly friction advisors face in their daily operations – to give them back time that they can spend on revenue-generating activities.”

The reasoning behind Elements’ creation has proven itself not just with the billion dollars in new AUA garnered over the past seven months, but with its tracked efficiency with users. Since its launch in January, Elements has grown to 325 active users having submitted over 12,000 tickets year to date, with the Operational Alpha stats below:

Process	Duration without Fusion Elements	Duration with Fusion Elements
Opening 1 Account	15-20 Min.	2 Min.
Opening Multiple Accounts	15-20 Min. Each	2-5 Min. Total
Distributions On Tickets	10 Min.	3 Min.
Household/Account Rebalance	20 minutes	90 seconds
Transitions	45-60 Days	14-21 Days

Advisors can get an up-to-the-minute picture of this efficiency by visiting [Fusion’s Operational Experience Dashboard](#).

“Our need for a technology platform, like Fusion Elements, has been growing as we’ve reached new heights of success,” said Daniel W. Donihue, MSFS - financial advisor and CEO of American Lifestyle. “Fusion identified the need and made the concerted effort to fulfill it. I keep on top of new innovations in advisor technology and, while there are amazing advancements in client-facing digital experiences, I’ve seen an overall lack of development in operations software. We’re thrilled to know that Fusion continues to focus their energy and innovation on this very important part of our business and that they, wisely, jumped on the opportunity to become an early adopter and industry leader.”

Rick Durkee, a financial advisor and founder of Coastal Financial Planning Group in Charleston, SC, adds, “Since adopting Fusion Elements, I’ve seen my client relationships deepen. The technology successfully streamlines my operations giving me back time that I can use to truly connect on an individual level with my clients and prospects. We had been using multiple software systems for our operations and we still do, but now all the systems are accessible via a single sign-on and integrated, eliminating dual records and bottlenecks created by repetitive data entry.”

### About Fusion Capital Management

Founded in 2011, Fusion Capital Management is a technology and turn-key asset management platform headquartered in Dallas, TX. Fusion serves over 375 financial advisors and 2,500 agents nationwide, providing a proprietary technology platform and solutions that offer mid-to-back office support. To learn more about Fusion, please visit [www.FusionCM.com](http://www.FusionCM.com). For more information please see our Form ADV at <https://www.adviserinfo.sec.gov/IAPD/default.aspx>.