

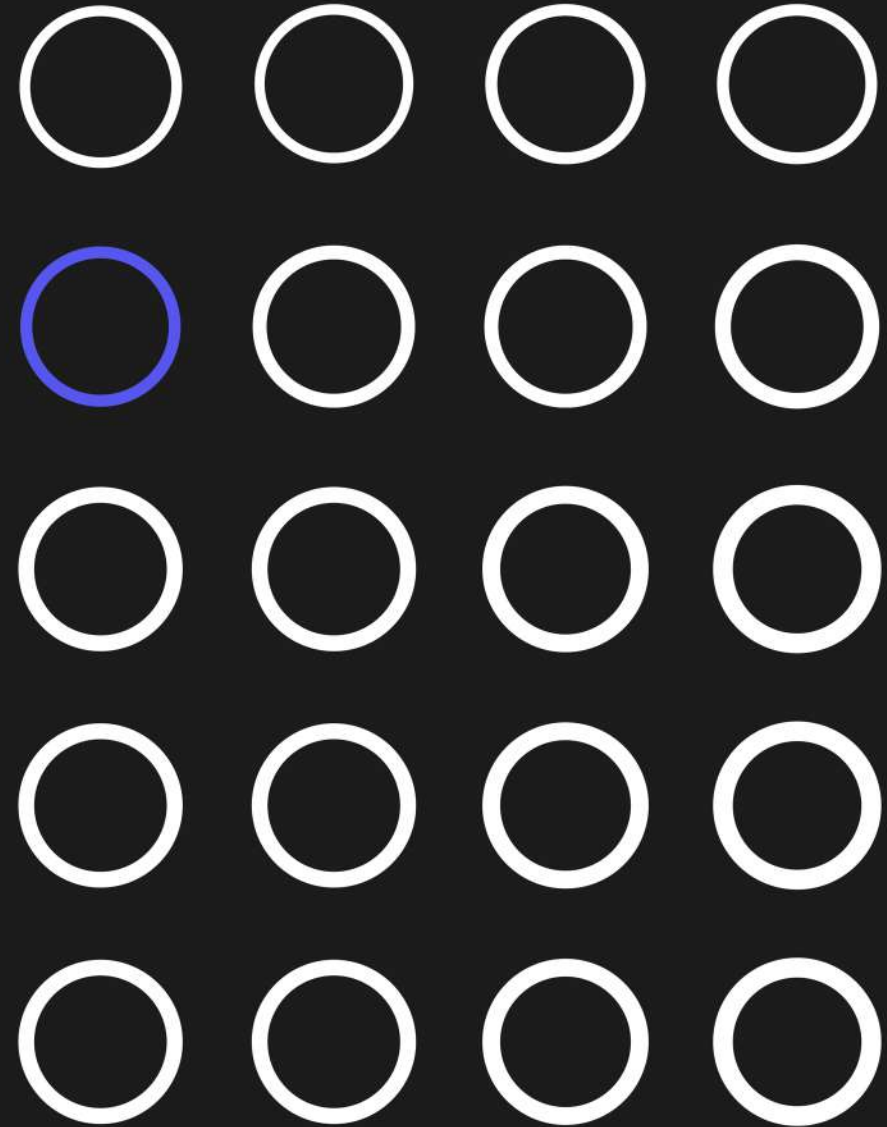


Company Overview March 2024

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# We make it easy for financial advisors and institutions to be digital wealth leaders.

Give your clients and advisors the digital experience they want. Get the workflows and process automations you need to grow at scale.





# Become the Disruptor.



Hybrid Digital Advice

Self-Directed

finTAMP

Digital Marketplace

FusionIQ One is a true end-to-end, digital platform with four seamlessly integrated modules that deliver an unmatched breadth and depth of benefits and features.



# You Win the Digital Game with FusionIQ One.

## Workflows. That. Actually. Work.

True end-to-end workflows means you can profitably scale your growth, seamlessly integrating new revenue streams.

## Pay as You Grow

Integrated modules means you pay for what you need, when you need it.

## Say Goodbye to Legacy Systems

Our all-in-one platform let's you say goodbye to legacy software in your tech stack, reducing costs while increasing efficiencies.

## Zero to Digital

Our leading technology and experienced team can give you an award-winning digital platform in as little as six weeks.

## No Long-Term Custodian Contracts

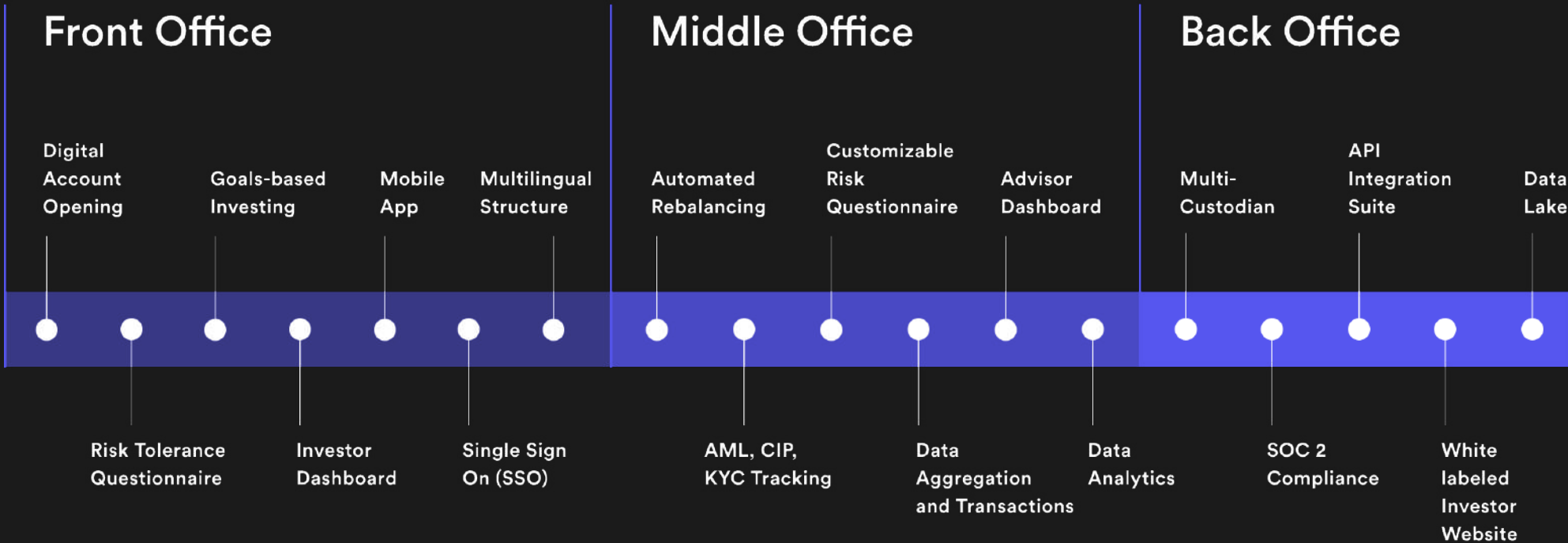
Our multi-custodian platform gives you exposure to a wide range of custody options at attractive pricing.

## Onboard. Fast.

Onboard clients in as little as five minutes on many of the most trusted custodians.

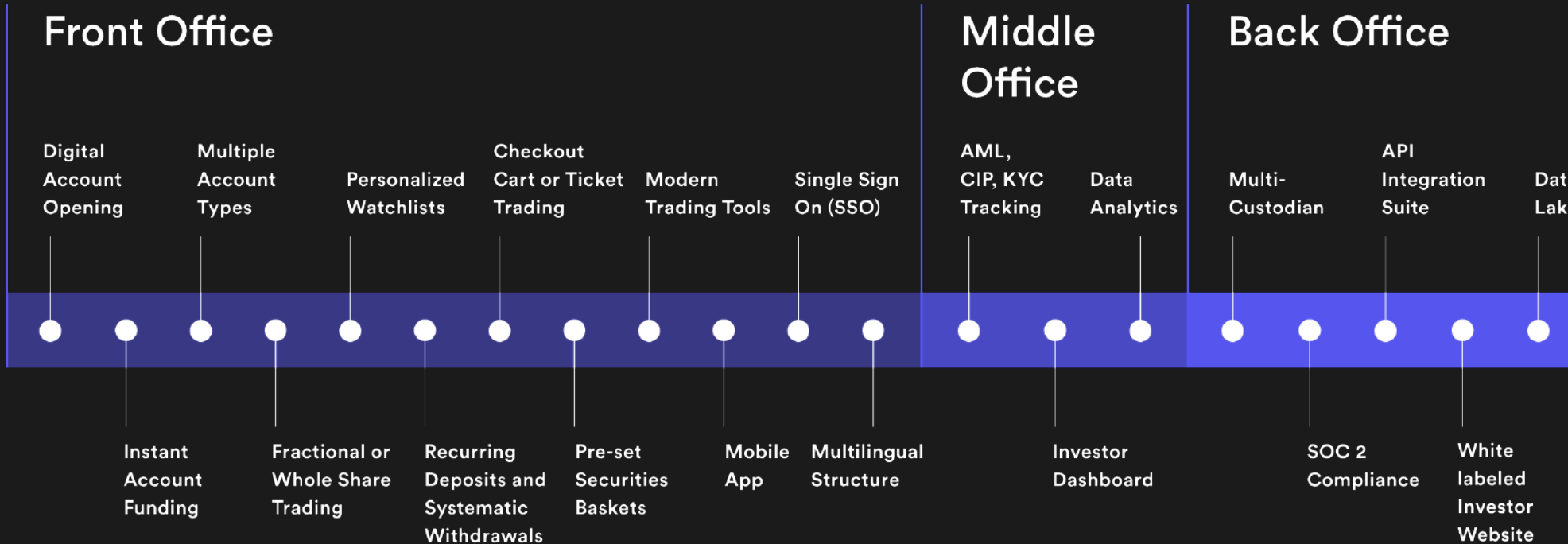


# Hybrid Digital Advice



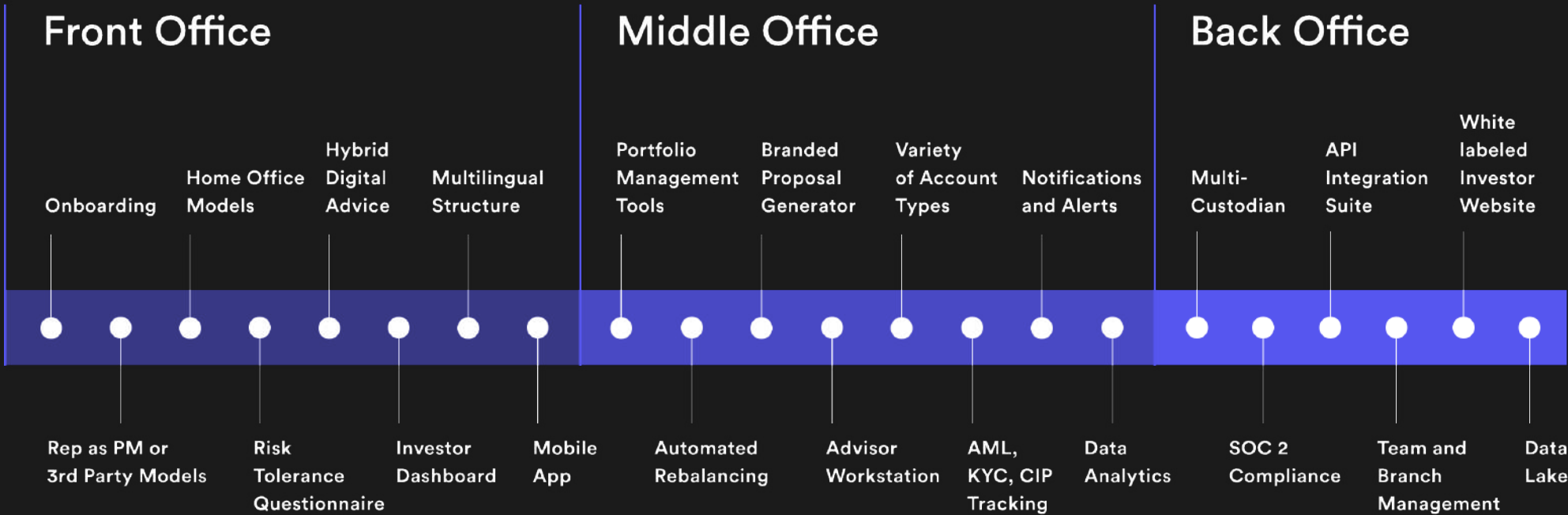


# Self-Directed



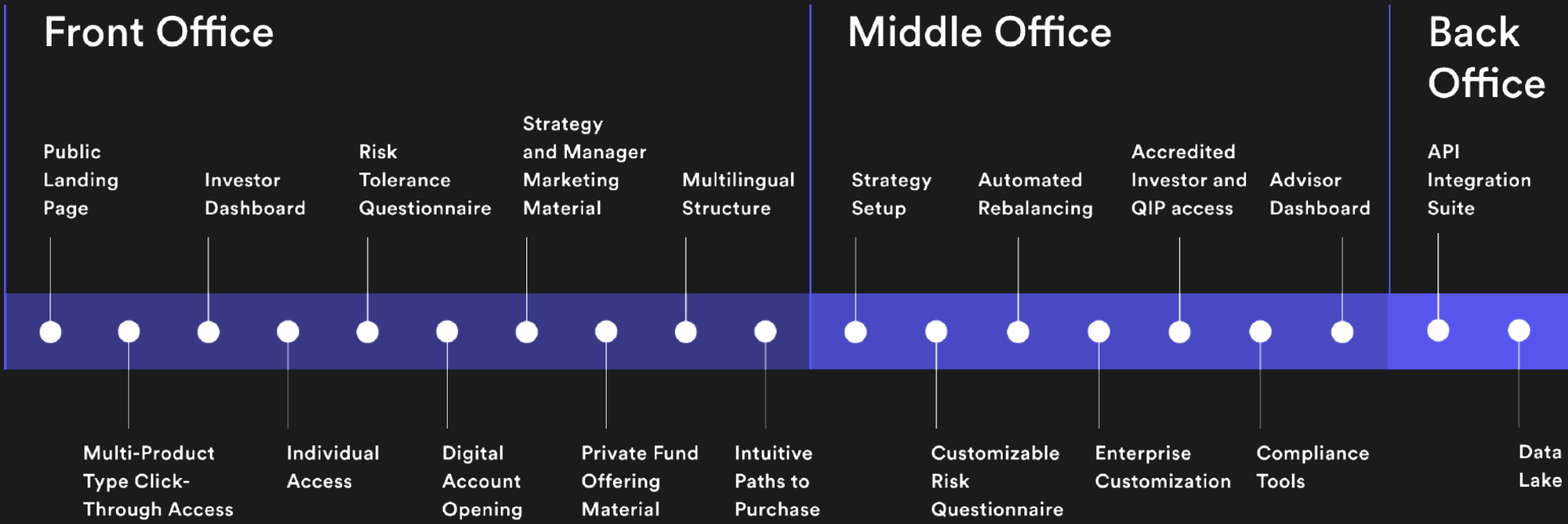


# finTAMP





## Digital Marketplace







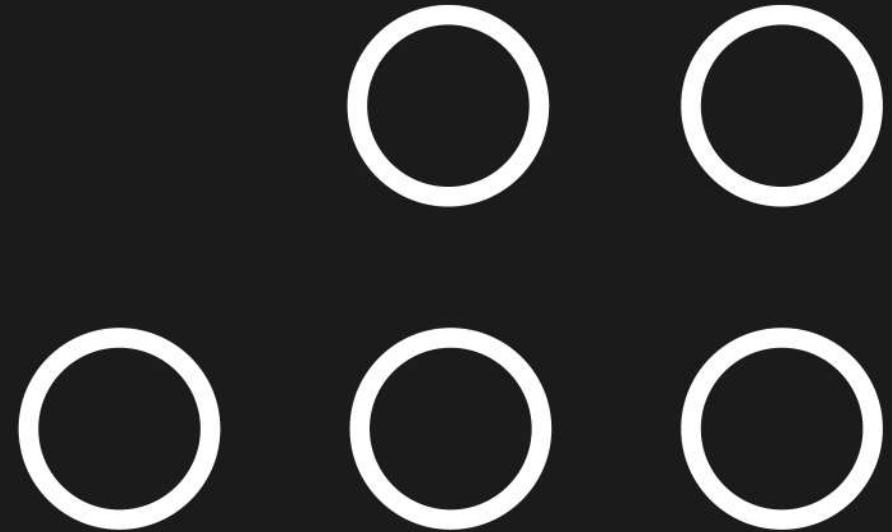
# Scalable Products for Profitable Growth



 fusionIQ  
Journey

 fusionIQ  
TAMP+

 fusionIQ  
Market One





The digital experience  
your clients and advisors  
want. **The investing  
services you need.**

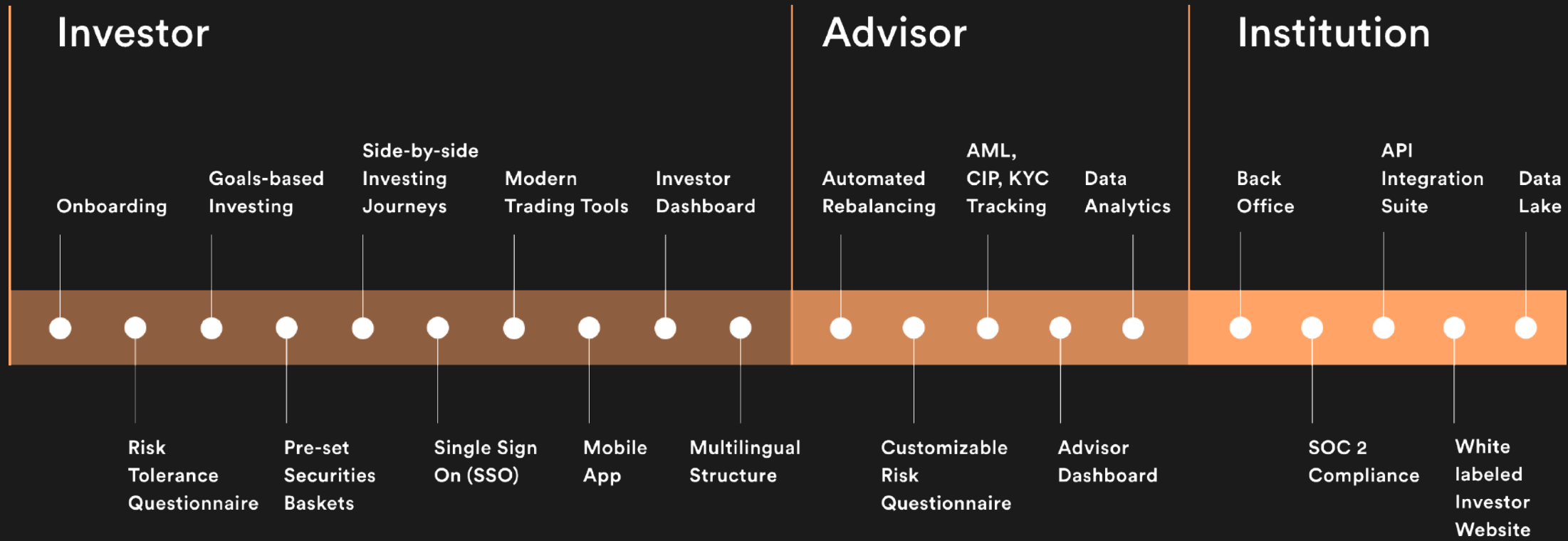
Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, **FIQ Journey will have you achieving your goals in as little as six weeks.**

**FIQ Journey**





## FIQ Journey

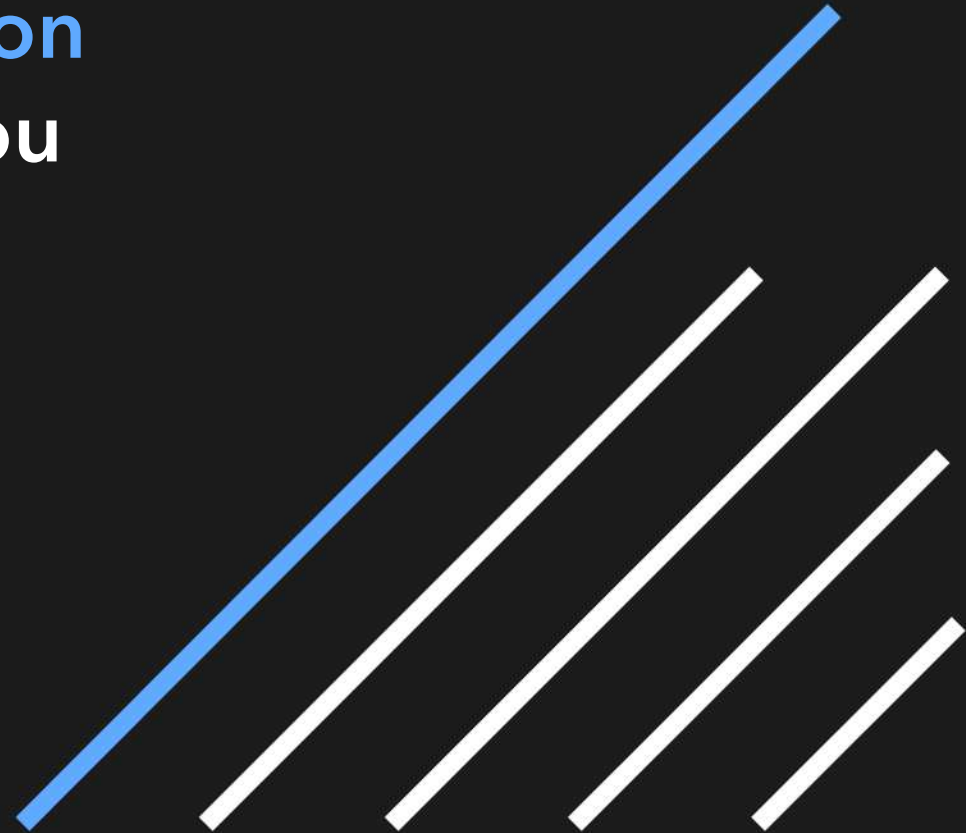




## Get the **portfolio diversification** investors need at the scale you want to grow.

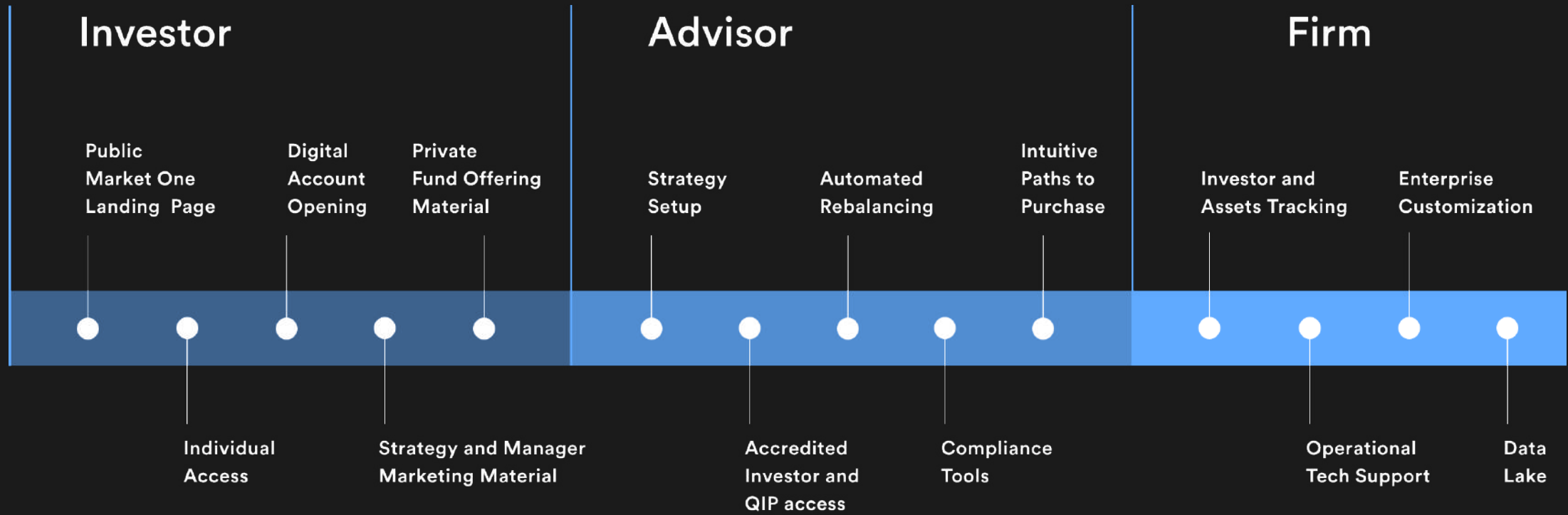
Digitally onboard to a **single market** to find and invest in **digital assets, SPV and alternative funds, private investments and ETFs** at a lower cost. Create unified advisor and client portals and produce personalized portfolios at scale. And asset managers have a digital channel to distribute their products.

**FIQ Market One**





# FIQ Market One





Get the easy on-ramp to  
greater efficiency and higher  
productivity at a lower cost  
than a conventional TAMP.

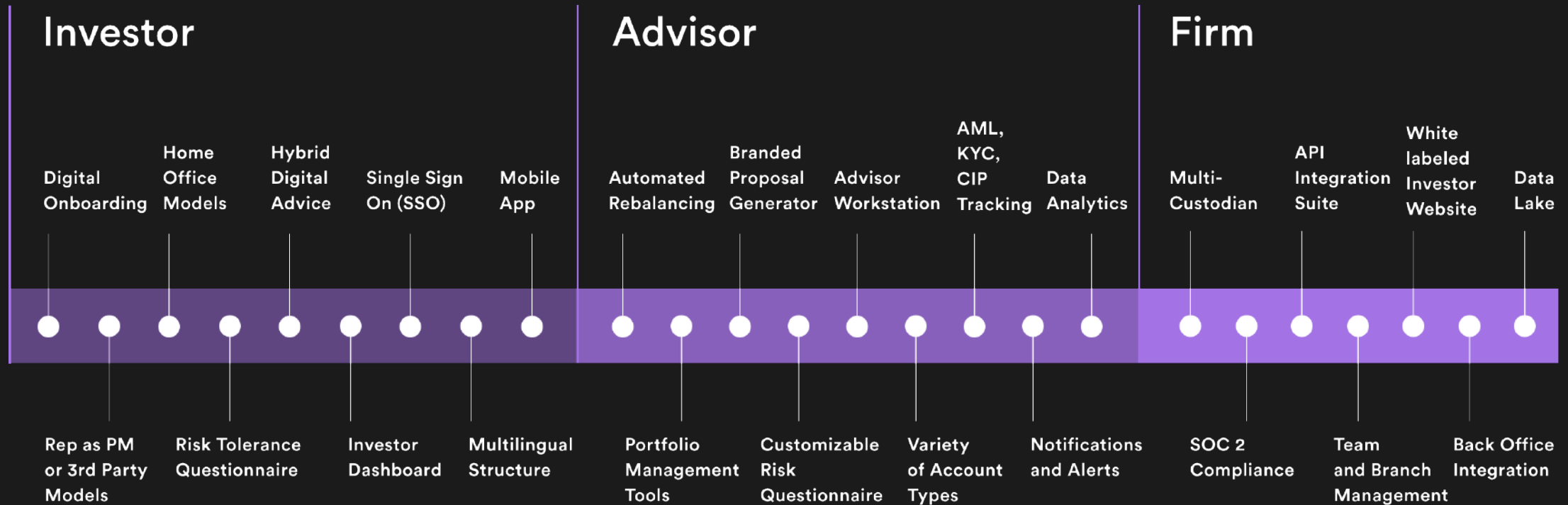
FIQ TAMP+ is the first true digital TAMP, integrating our end-to-end wealth management platform with advanced portfolio management technology. FIQ TAMP+ provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale for profitable organic growth.

FIQ TAMP+





# FIQ TAMP+





# FIQ leadership team brings an unparalleled depth and breadth of experience in financial services.



**Mark Healy**

Chief Executive Officer  
34+ Years Experience



**Jim Cott**

Chief Financial Officer  
25+ Years Experience



**John Kimbro**

Chief Technology Officer  
34+ Years Experience



**John Guthery**

Chief Investment Officer  
27+ Years Experience



**Peter Brittain**

Head of Business Development  
6+ Years Experience



**Sean Ristau**

EVP Business Development  
23+ Years Experience







# We Partner with Global Technology Leaders



Google Workspace

DocuSign®

 Jira Software



 twilio



QUODD

 secureframe



FusionIQ integrates with many of the largest and most trusted custodians.

APEX|Clearing™



DRIVEWEALTH



anchorage  
digital

 InteractiveBrokers



BNY MELLON | PERSHING



# We Deliver Digital Wealth.

**5 Minutes**

to Onboard a New  
or Existing Client

**6 Weeks**

to Implement a  
White Label Platform

**115,000+**

**Investors**

on FusionIQ One



# An award-winning platform.

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Finalist Banking Tech Awards USA 2024 Best as-a-Service Solution for Wealth Management

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Double Nominee Fintech/TAMP Platforms 2023 Think-Advisor LUMINARIES Awards

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Highly Commended 2023 Fintech Futures Banking Tech Awards Best Digital Solution Provider

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Asset Manager Platform of the Year 2022 Wealth Solutions Report

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Double Finalist 2023 WealthManagement.com 'Wealthies' Industry Awards

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America's Best TAMPS 2021, 2022 and 2023

# Digital Wealth. Delivered.

Peter Brittain  
Head of Business Development

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pbrittain@fusioniq.io

