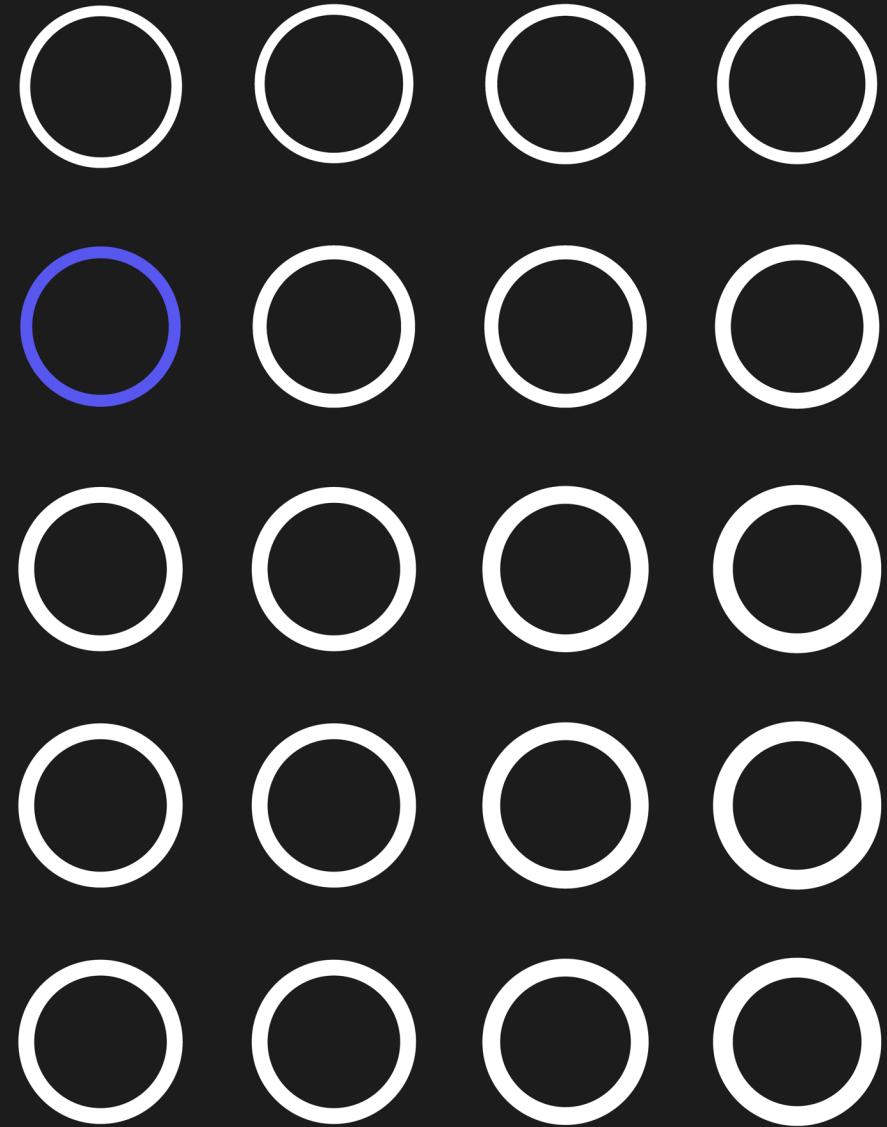




Company Overview May 2024

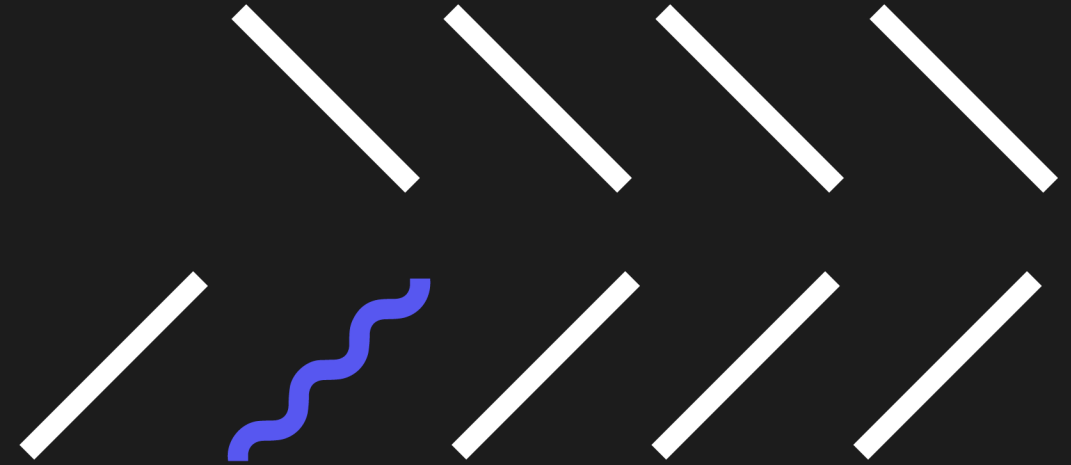
We make it easy for financial advisors and institutions to be digital wealth leaders.

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

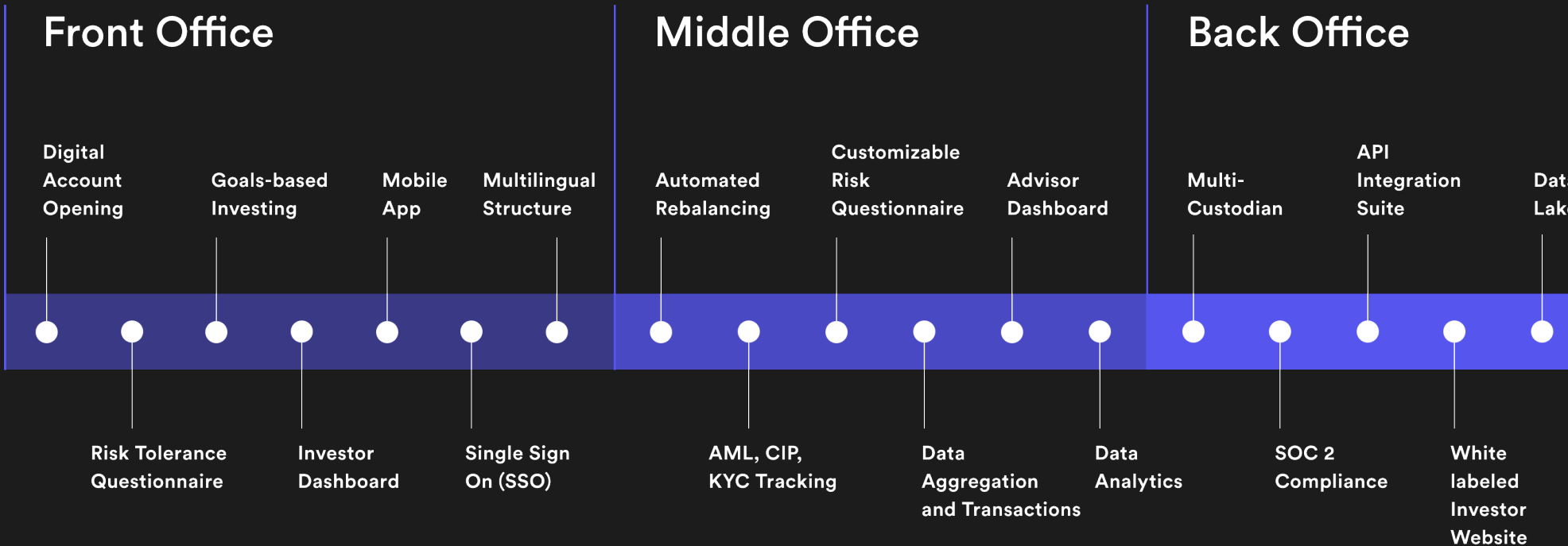
Our multi-custodian platform gives you exposure to a wide range of custody options at attractive pricing.

Onboard Fast

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

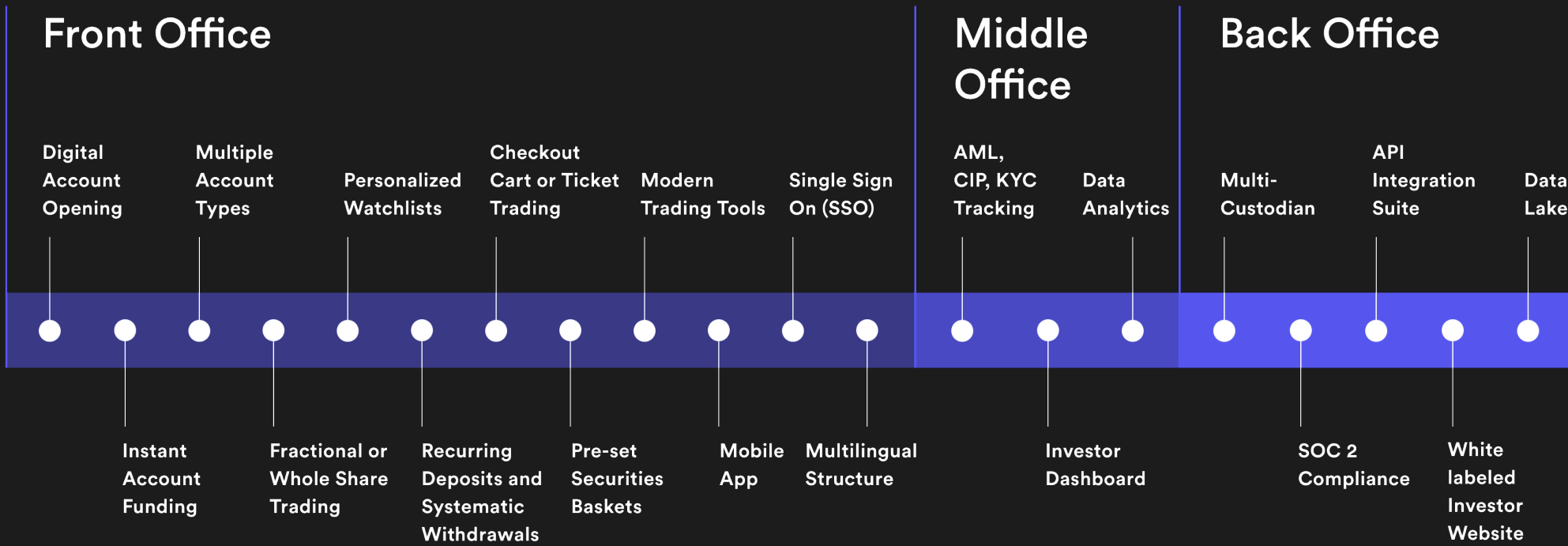


Hybrid Digital Advice



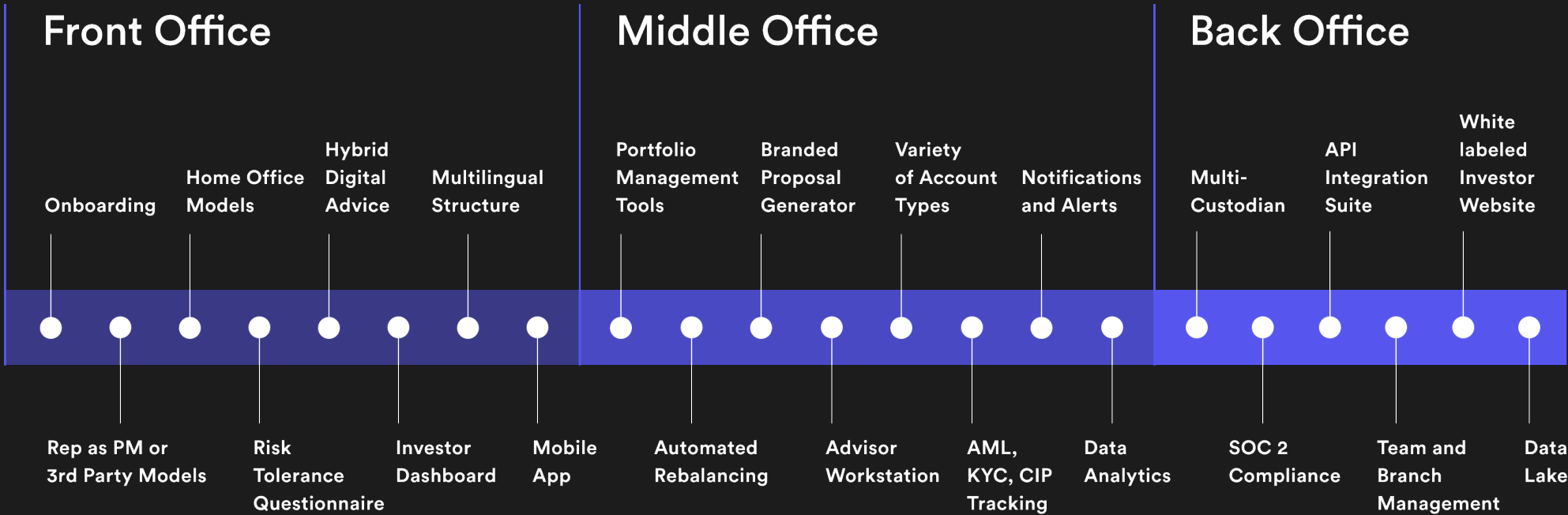


Self-Directed



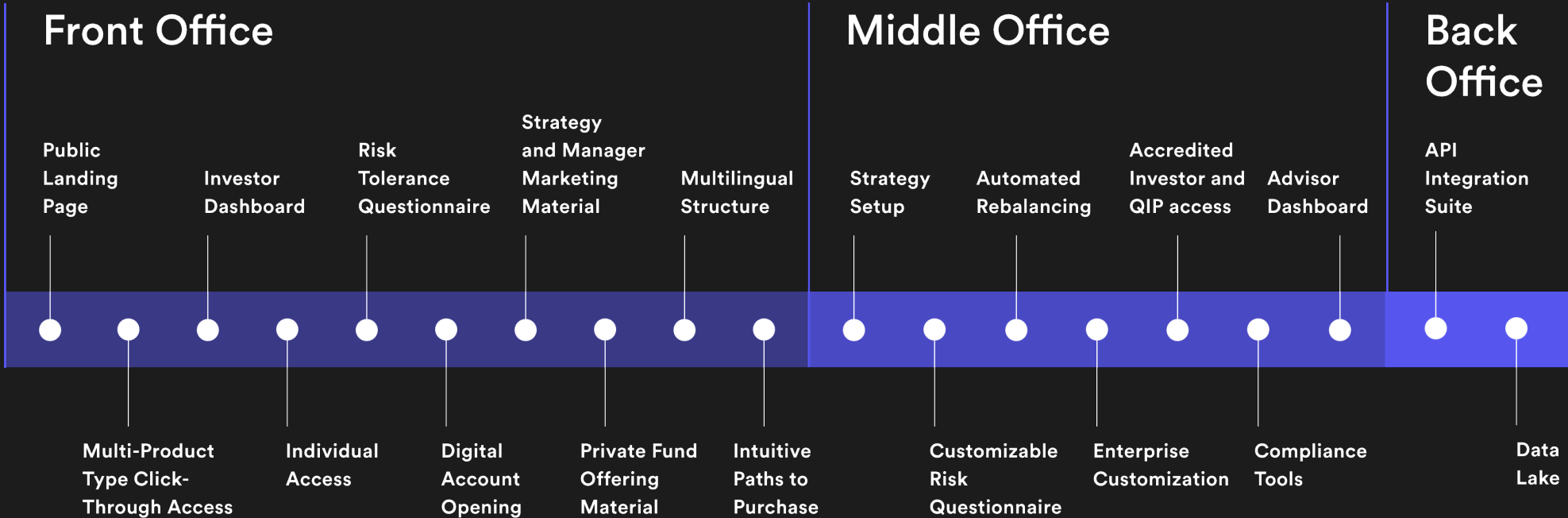


finTAMP





Digital Marketplace





The Flexible, Easy to Implement
Products You **Need to Win.**

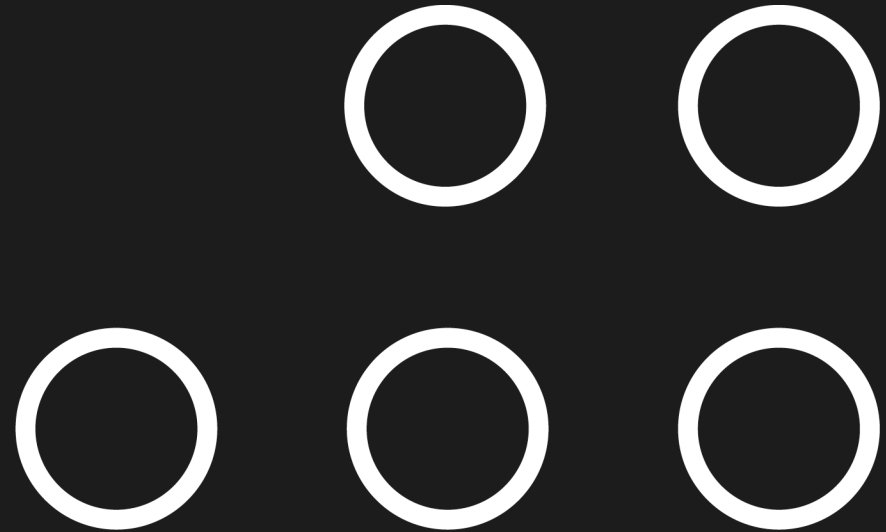


 **fusionIQ**
Journey

 **fusionIQ**
Market One

 **fusionIQ**
TAMP+

 **fusionIQ**
Freedom





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

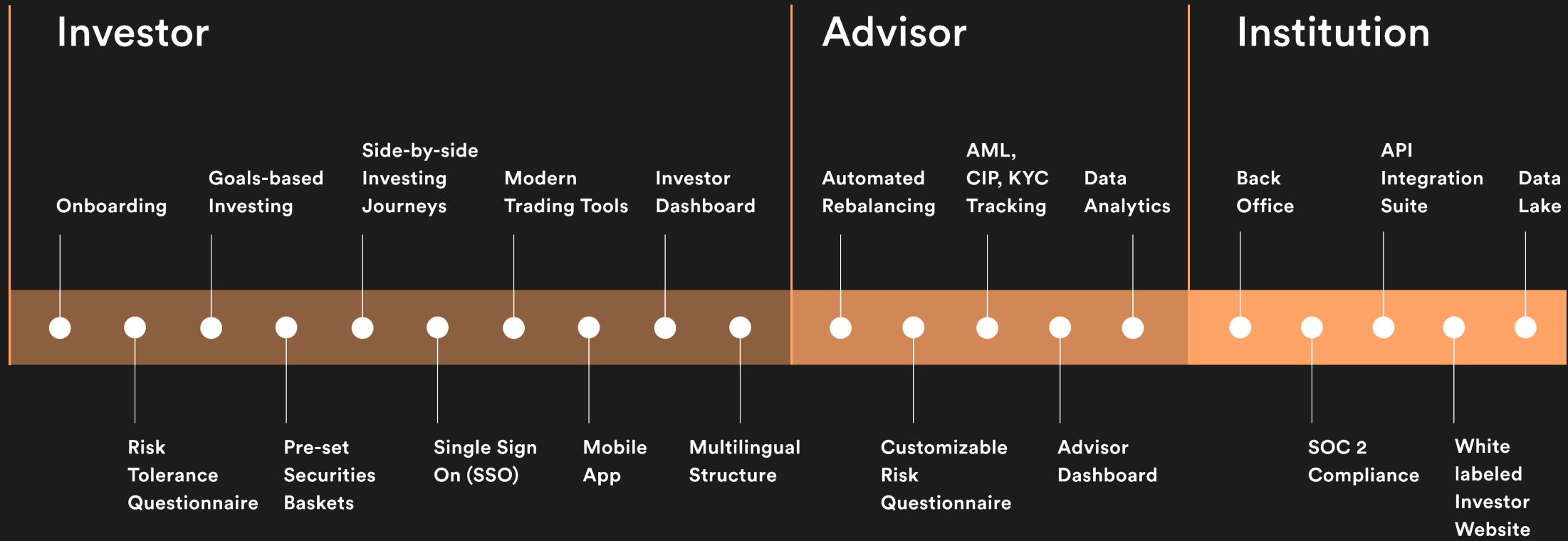
Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, **FIQ Journey brings together Hybrid Digital Advice and Self-Directed Investing in a single investor journey.**

FIQ Journey





FIQ Journey

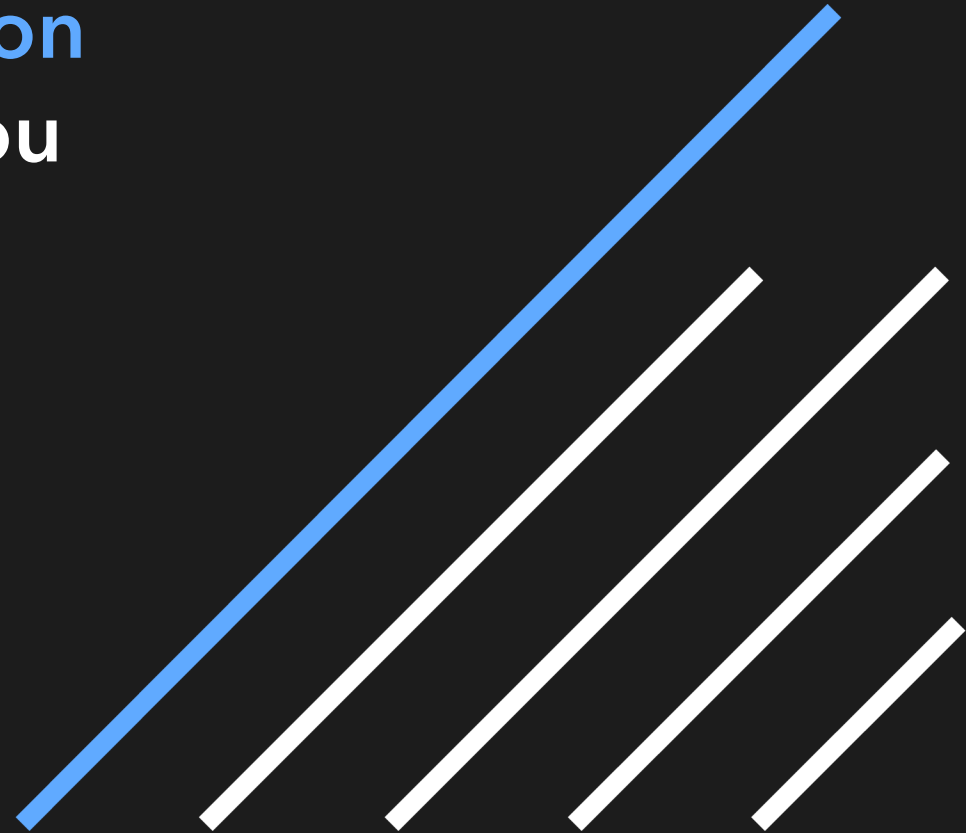




Get the **portfolio diversification** investors need at the scale you want to grow.

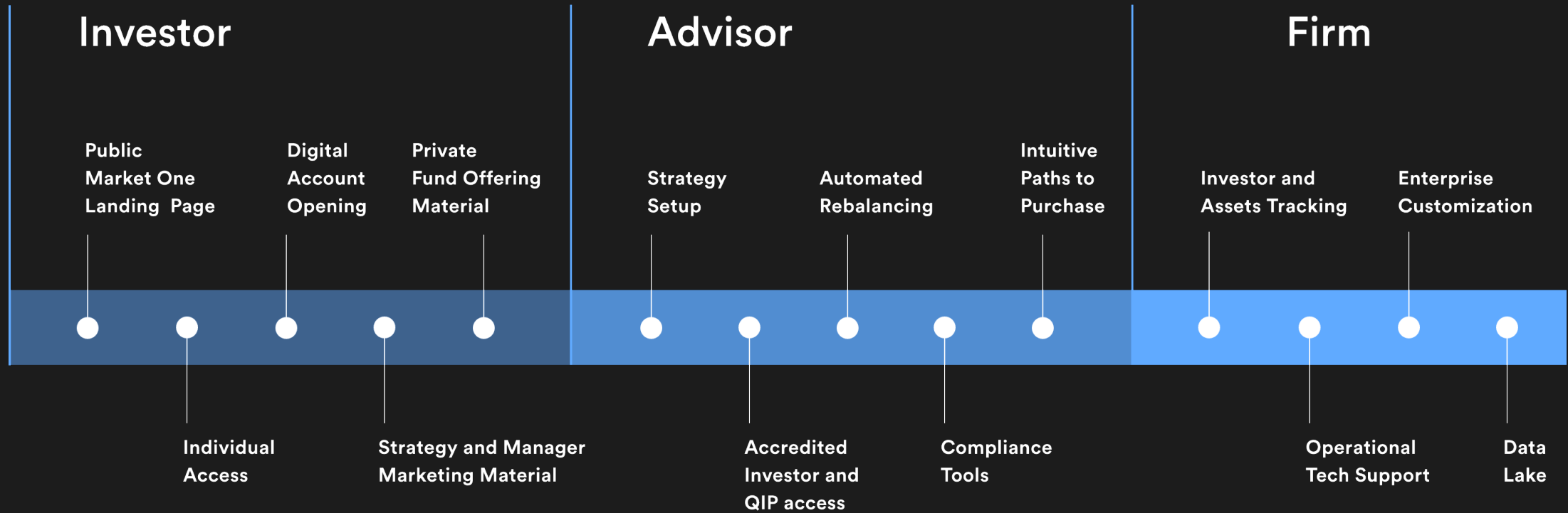
Digitally onboard to a **single market** to find and invest in **digital assets, SPV and alternative funds, private investments and ETFs** at a lower cost. Create unified advisor and client portals and produce personalized portfolios at scale. And asset managers have a digital channel to distribute their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

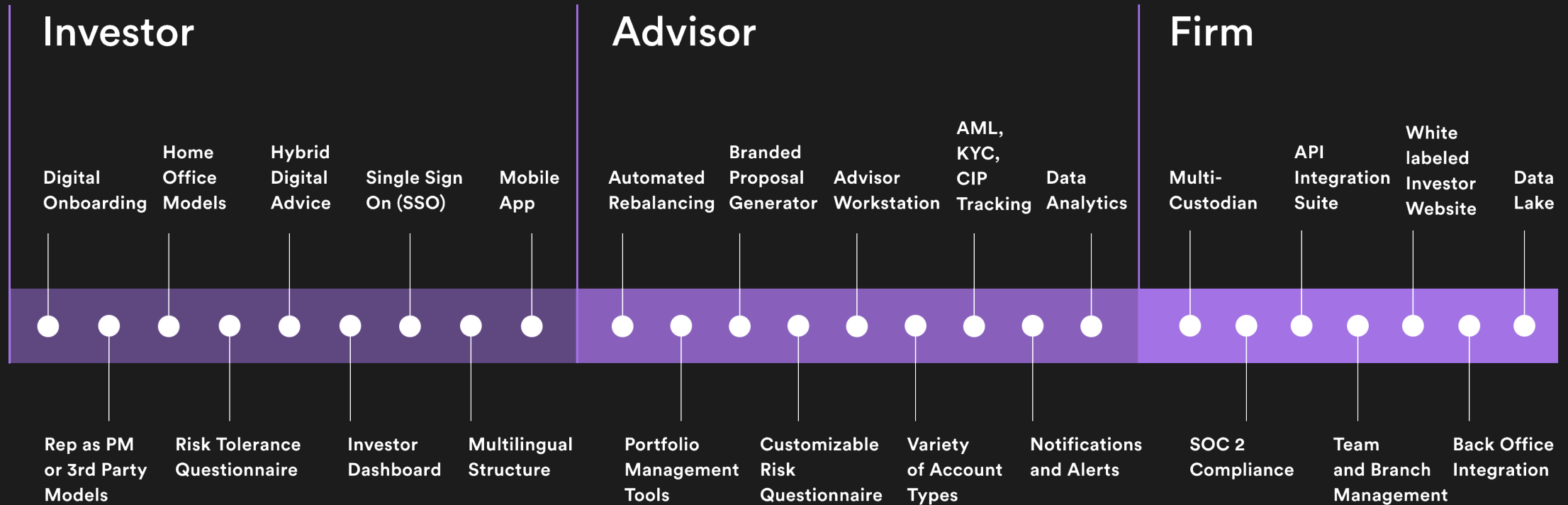
FIQ TAMP+ is the first true digital TAMP, integrating our end-to-end wealth management platform with advanced portfolio management technology. FIQ TAMP+ provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale for profitable organic growth.

FIQ TAMP+





FIQ TAMP+

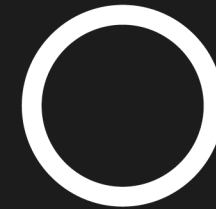
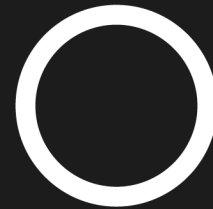




Make the **fast break to independence** with the **breakaway advisor platform** that puts you in control.

FIQ Freedom is the **turnkey breakaway advisor platform** that makes the journey to independence fast and easy.

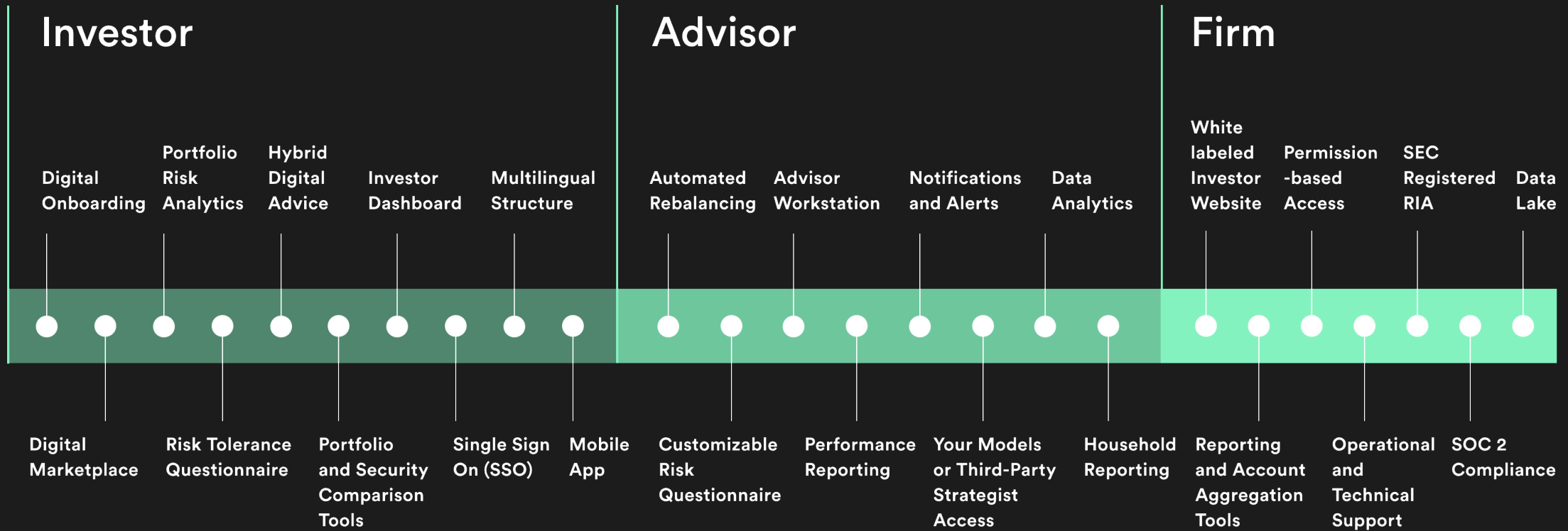
In as little as six weeks you'll get a white label wealth management platform that delivers the **modern advisor and client experience, advanced portfolio management tools, and workflow and process automations** transitioning advisors need to scale for success.



FIQ Freedom



FIQ Freedom





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





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

Excellence Awardee
WealthTech Provider of
the Year InvestmentNews
Awards 2024

Double Finalist 2023
WealthManagement.com
'Wealthies' Industry
Awards

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

Double Nominee Fintech/
TAMP Platforms 2023
ThinkAdvisor LUMINARIES
Awards

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

Asset Manager Platform
of the Year 2022 Wealth
Solutions Report

Digital Wealth. Delivered.

Peter Brittain
Head of Business Development

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