

# FusionIQ One

**A true end-to-end digital wealth platform with the flexibility and features to grow with you.**

Integrated and intuitive, FusionIQ One is an all-in-one platform with four easy to activate modules as your needs grow and you scale.



fusioniq.io

Hybrid Digital Advice

Self-Directed Investing

finTAMP

Digital Marketplace

## Hybrid Digital Advice

Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, the FusionIQ One Hybrid Digital Advice module delivers the features you need to realize your vision. From customized RTQs to powerful portfolio management tools, data aggregation and transactions, AML, KYC, and CIP tracking, investor dashboard, advisor workstation, teams management and alerts, the Hybrid Digital Advice module gives you the tools you need to grow.

## finTAMP

FusionIQ delivers the first true digital TAMP, integrating our all-in-one advisor platform with end-to-end digital investment management technology. finTAMP provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale, grow and improve profitability.

## Self-Directed Investing

The FusionIQ One Self-Directed investing module integrates essential features to realize your goals, whether it's a small accounts solution, a new revenue channel, lowering infrastructure costs, faster client onboarding, or giving your full advice clients an opportunity to make some trades on their own. From AML, KYC, and CIP tracking to check out cart or ticket trading, fractional or whole share trading, investor dashboard, watchlists, recurring deposits and systematic withdrawals, and a variety of account types, the Self-Directed module delivers.

## Digital Marketplace

Digital Marketplace is a single market for accredited investors, advisors, and firms to find and invest in digital assets, SPV and alternative funds, private investments, and ETFs through unified advisor and client portals. Create personalized, diversified portfolios at scale and a lower cost. And asset managers have a digital channel to distribute their products.

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## We Think Bigger

Many talk about an end-to-end digital wealth management platform. We deliver. FusionIQ One delivers an unmatched breadth and depth of benefits and features.

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## Empowering You to Do Great Things

FusionIQ One delivers the profitable digital workflows and process automations financial advisors and institutions need to scale their operations for growth.

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## Happy Clients. And Advisors.

FusionIQ One delivers an intuitive hybrid investing platform that empowers both clients and advisors. And it gives them attractive dashboards.

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## Zero to Digital

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

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## White Labeled so Your Brand Stands Out

Giving your clients new ways to invest with you, and a digital experience that is intuitive and enjoyable, on the device of their choice, your brand stands out.

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## A Tech Stack that Works for You

FusionIQ One with single sign on (SSO) lets you simplify your tech stack to realize greater efficiencies and achieve higher productivity.

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## Multi-Custodian Platform

FusionIQ integrates with many of the largest and most trusted custodians to minimize conversion risk.

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## API Integration Suite

FusionIQ One offers an API suite to help with integrations so you can get even more out of your digital platform.

# Scale your growth with FusionIQ One.

[Book a Demo Today](#)

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join us  

