# INFINEX TECHNOLOGY SOLUTIONS


**Advisor Dashboard**

The Infinet interactive dashboard is a fully customizable landing page that provides a snapshot of all key metrics and activity, allowing users to drill-down to specific areas as needed. This interactive technology is personalized by program manager, advisor, associate advisor, registered branch employee, sales assistant or licensed branch employee. Users can select from an expansive group of widgets to further customize settings, given preferred workflows and favorite system tools.

**Online Account Opening**

Infinet's account opening process is highly intuitive and utilizes broker-dealer technology in conjunction with clearing firm capabilities and online product partner applications. Data is mapped between the various entities, minimizing data entry and maximizing efficiencies. E-signature capabilities can be used in-person or remotely.

**Referral Platform**

The fully integrated referral platform is personalized to the unique needs of the bank and credit union channel. It includes robust reporting features dedicated to tracking referral rates, branches and deposits.

**Client Dashboard**

The client dashboard aggregates client holdings across all sources, populating a "quick-view" of a client's overall portfolio, performance and activity.

**Client Central**

Client Central is an entirely new way to access client information, providing a centralized hub for all important data, reports and action items. It's your go-to snapshot for all needs including client searches, opening a new account, form creation, client-specific Enhanced Wealth Reporting and more!

**Client Central Pro**

Client Central Pro is your one-stop client relationship management system! Manage your entire book of business through more detailed account views, transaction breakdowns, calendaring functionality, the ability to build households and link contacts, create centers of influence and more!

**Wealth Management Portal**

Infinet's Wealth Management portal offers research, proposals and trade management tools for advisors with RIA business.

**Reporting Tools**

The reporting platform provides summary and detail reports on commissionable activity, AUM, book of business reporting, branch reporting, client activity and compliance related material. View reports by specific product, product types, branch and more. Hierarchies allow for a systematic breakdown on all Infinet reports.

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**Product Search Engines**

Flexible and easy-to-use search engines provide product information including current rates, rider comparisons and commission schedules. Run side-by-side comparisons, analyze products, produce illustrations, retrieve prospectuses, download historical riders and more!

**Digital Marketing Tools**

Marketing Solutions includes access to pre-approved content, fully customizable materials, print and digital newsletters, social media posts, videos and full campaigns tailored to the needs of advisors in the bank and credit union channel.

**Lead Tracking**

Infinet's CRM is fully integrated with the referral manager and account opening process, allowing for lead and life-cycle tracking of the client relationship.

**Service Central**

The Service Central ticketing system easily creates and tracks all service and operations requests. Enter questions on-demand, receive timely updates and never lose track of an inquiry again. A built-in knowledge base provides instant access to commonly asked questions.

**Infinex University**

Infinex University is Infinet's virtual education system with on-demand training tracks and classes. System users can access material in a quick and efficient manner with key word tagging and role-based assignments. Tracks can be personalized by goals and each class averages 20 minutes; there are a couple that are slightly longer. Find numerous classes on everything from business planning and marketing, to system tips and increasing referrals.

**CONNECT Communication Forum**

All important Infinex communications are posted to the CONNECT Blog. Collaborate with other members of the Infinex team and join the conversation using CONNECT's discussion boards, calendar and photo galleries.

**Program Manager Hierarchy**

Infinet allows program managers to view invested dollars and revenue, based on a program's hierarchy. This includes reports by advisor, role, product type, product company, territory and branch. AUM is also reported using these categories.

Looking for more information on how Infinex's Technology Solutions can help you drive revenue in 2018? Call **Jere Colcer, SVP, New Business Development** to request a walk-through of our new proprietary platform, Infinet.

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