



# GUIDED DIGITAL ADVICE

TEAM CONTACT DETAILS:  
[www.infinexgroup.com/team](http://www.infinexgroup.com/team)

CALL US TODAY:  
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Infinex’s digital advice platform was designed to meet the needs of clients across the wealth spectrum. It can be used collaboratively by both financial professionals and clients. It can also be driven solely by the financial professional or by those clients drawn to self-guided technologies.

## Key Platform Features Include:

- Integrated account opening and money movement
- The ability to customize at the program level
- Data aggregation for outside accounts
- Different levels of portfolios based on account size
- The ability to control data & manage the relationship over time

## Meet the Demands of Your Clients:

Clients can get started with an account minimum of **\$5,000.\***  
Fees vary slightly by institution, but usually start at **45 bps.\***  
Clients want a digital solution that’s:

-  Easy to use and understand, with timely and helpful assistance when and where it’s needed.
-  Is all-inclusive and can display the big picture of their savings and investments relative to a goal.
-  Capable of recommending an investment portfolio that’s right for their financial goals and risk level.

## Why Jemstep?



*“We understand that the need to digitally engage with clients is becoming increasingly important and we take that demand seriously.*

*Infinex selected Jemstep as our partner because of their strong industry reputation. Furthermore, their platform can be deployed as a fully digital, investor-driven option or as a hybrid solution supporting the financial professional-client relationship.*

*Given the range of institutions we support at Infinex, it is imperative to have services that can adapt to the unique needs of our banks and credit unions, along with the diverse preferences of their clients.*

*Our digital solution will help you meet the needs of your clients, while delivering the seamless digital experience they expect.”*

—Stephen Amarante,  
Infinex President & CEO

*\*Account minimums & fees are subject to change. NOT FOR DISTRIBUTION TO RETAIL INVESTORS. 01.2021.*

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