Resilient

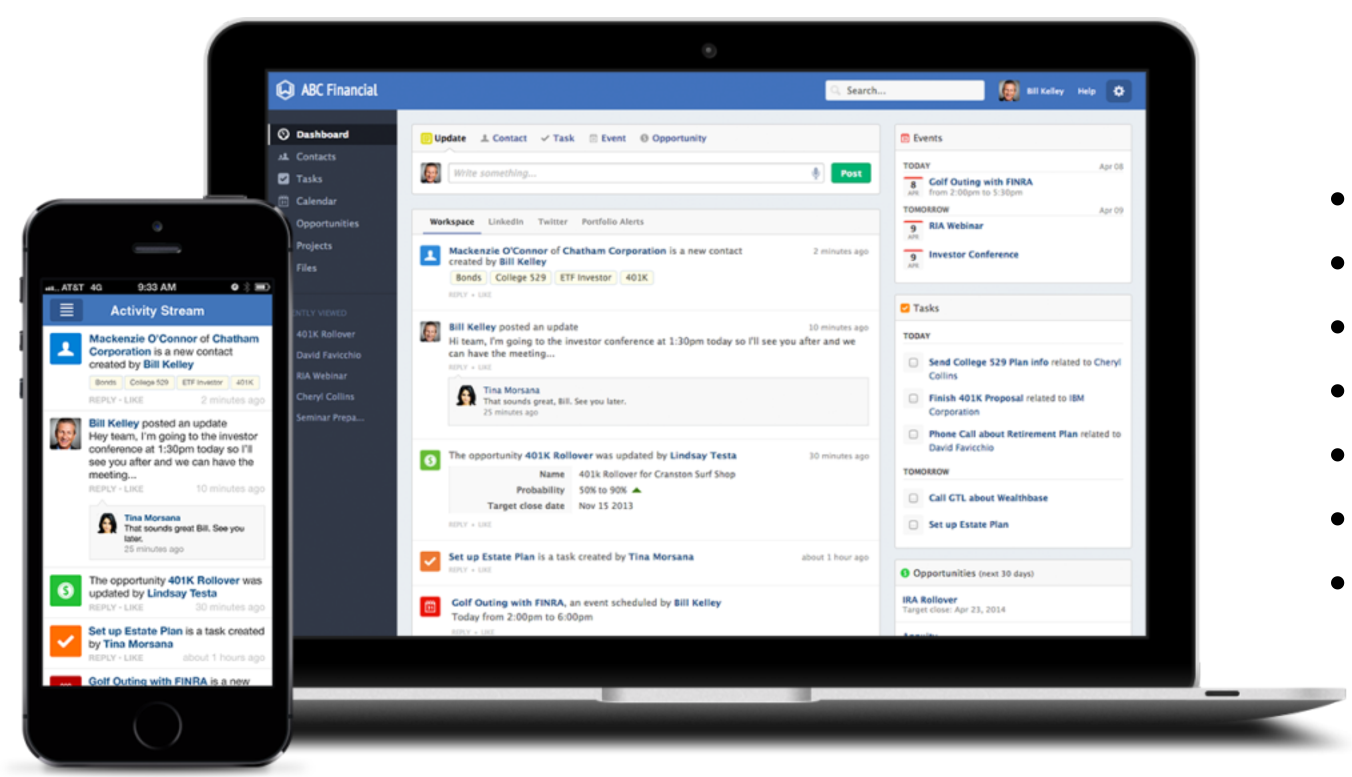
Best-In-Class CRM & Client Touchpoint System

Wealthbox

AB Touchpoint System

Resilient

The Wealthbox CRM & Practice Management System



Wealthbox

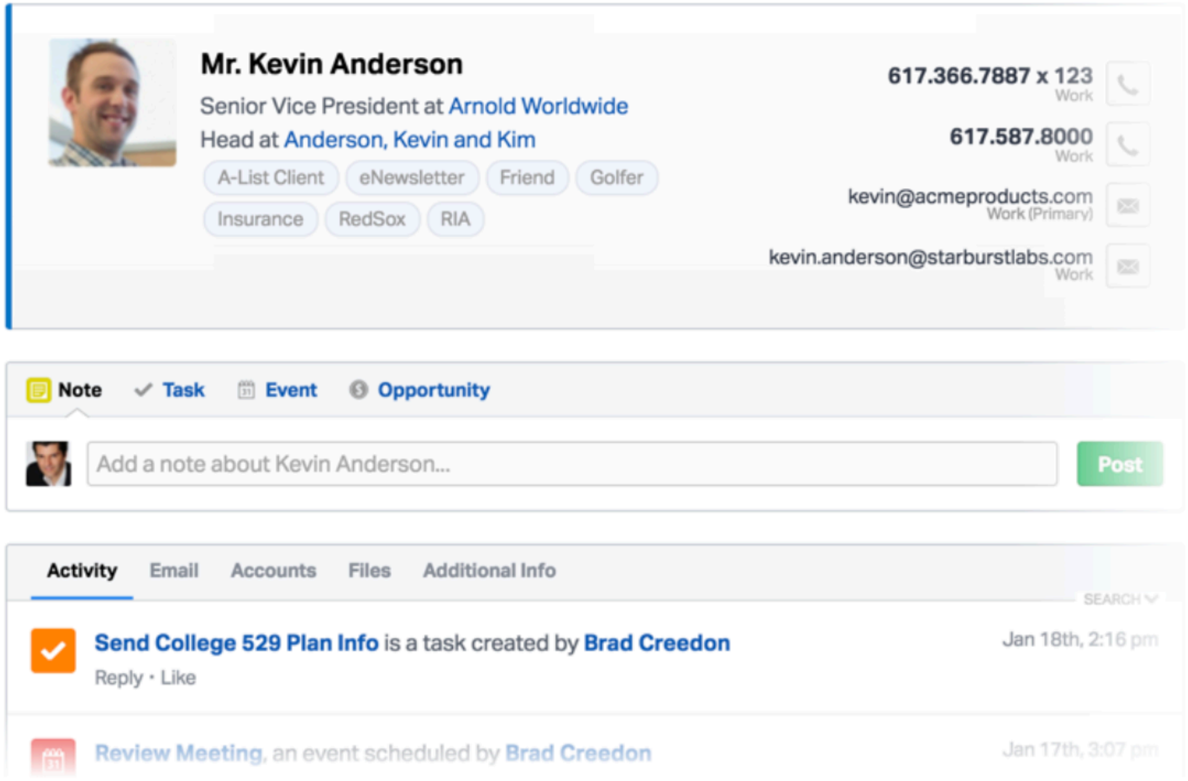
- Best in class CRM
- The backbone of your tech stack
- Robust mobile application
- Serves as the operating system of your business
- Robust integrations
- Systematizes client communications
- Systematizes operations

Resilient

CONTACT RECORD PAGE

See the full picture of your clients.

Stop squinting in a sea of data. With an easy-to-view layout and a quick note-taking interface, you can keep track of all phone calls, emails, files, and financial information.

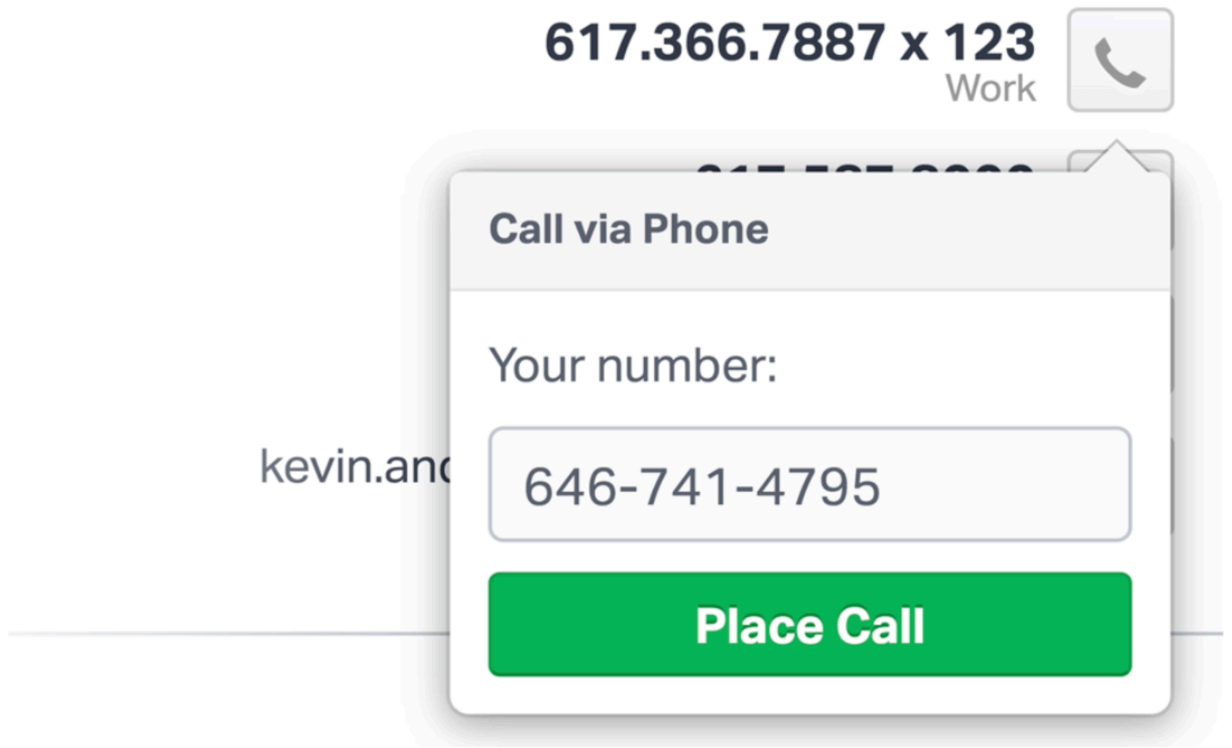


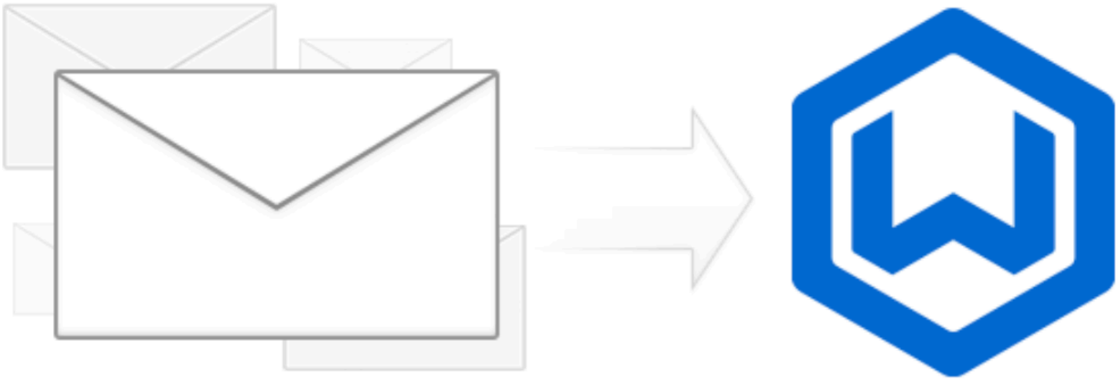
Resilient

CLICK-TO-CALL

Get a client on the phone in one click.

Save time and be productive. Just click on a contact's phone number in Wealthbox and our system calls out to you and your contact for an instant telephone call.





EMAIL DROPBOX

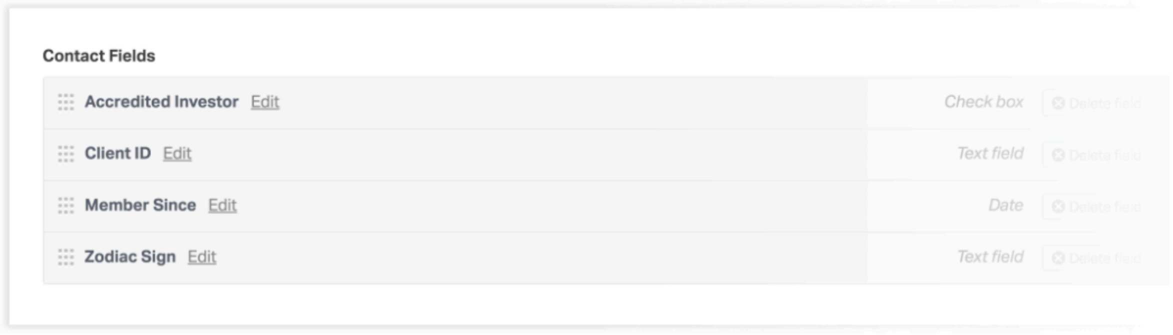
Store all emails between you and your clients.

You can send, forward, and Bcc all emails to your private Wealthbox email dropbox address and they'll connect to the right contact record page of specific contacts in your account.

CUSTOM FIELDS

Create customized data fields to capture whatever you want.

In Wealthbox you can set up special fields, text dates, and checkboxes based on your business requirements. Drag-and-drop the order of your custom fields inputs with ease.



Resilient

TAGGING

Easily group your prospects and clients.

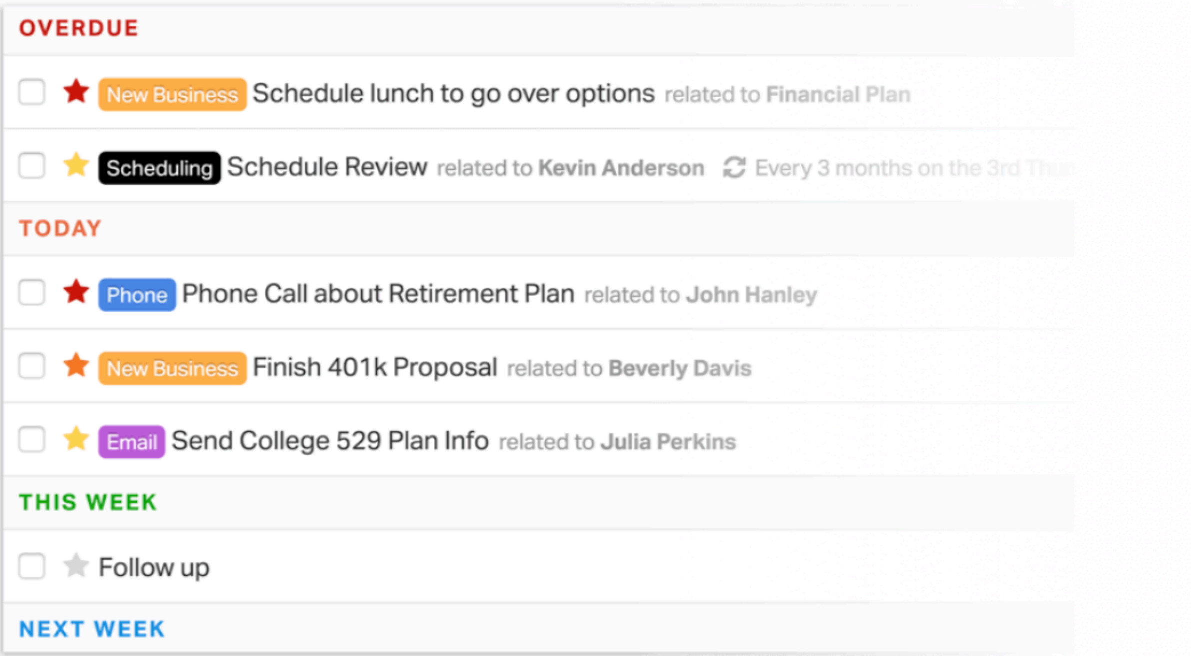
Tag and group your contacts with ease in Wealthbox. Combined with advanced filtering features, tagging allows you to find and communicate with your prospects and clients more effectively.

Resilient

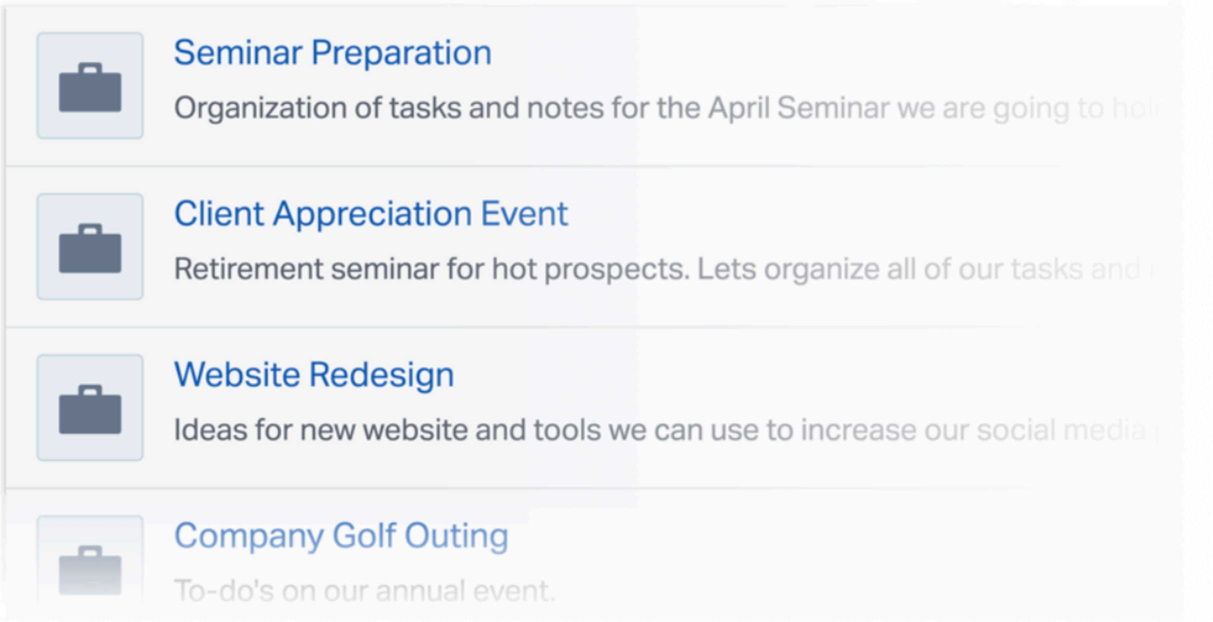
TASK INBOX

Stay organized and keep your practice in order.

Create tasks and link them to contacts or financial advisory opportunities. Assign tasks to coworkers and track progress.



Resilient



PROJECT MANAGEMENT

Planning something? Collaborate and track your project with ease.

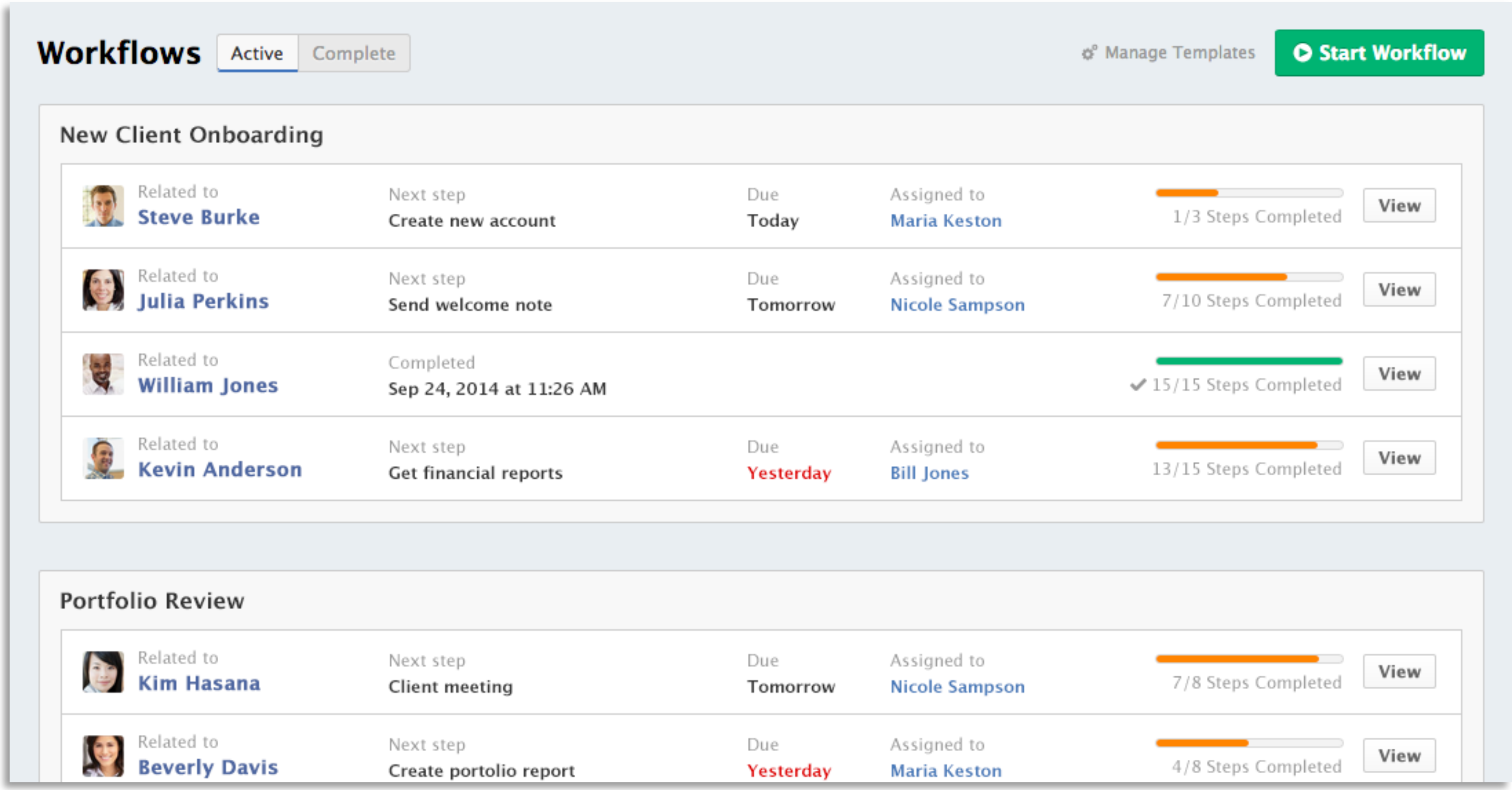
Keep everyone in sync on project initiatives within your firm with the simple, lightweight project management feature within Wealthbox.

Resilient

WORKFLOWS

Grow your business through efficiency.

When a certain event occurs, like meeting a new referral, you can set up an automated workflow associated with this new contact to ensure you and your group are following up with the right actions. Checklist or sequential options. Easy.

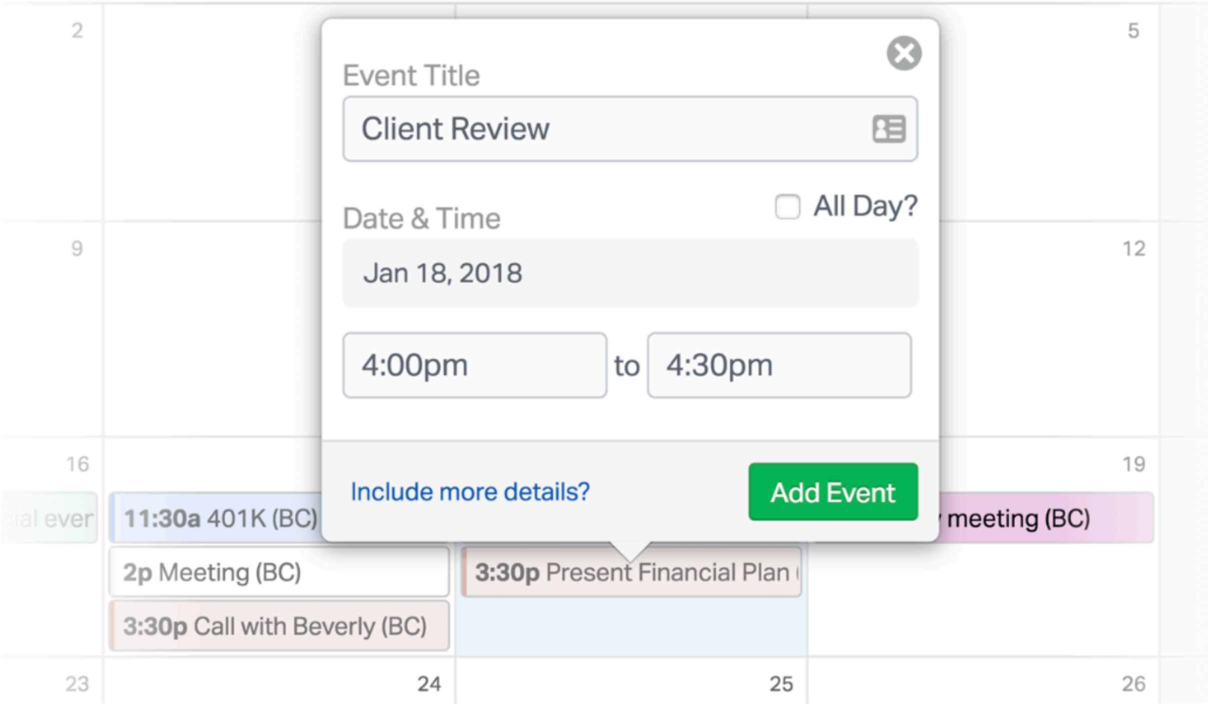


Resilient

INDIVIDUAL AND GROUP CALENDARING

One place to manage different schedules.

You get to create different calendars and use customized colors in one view with simple permissioning in the Wealthbox calendar.



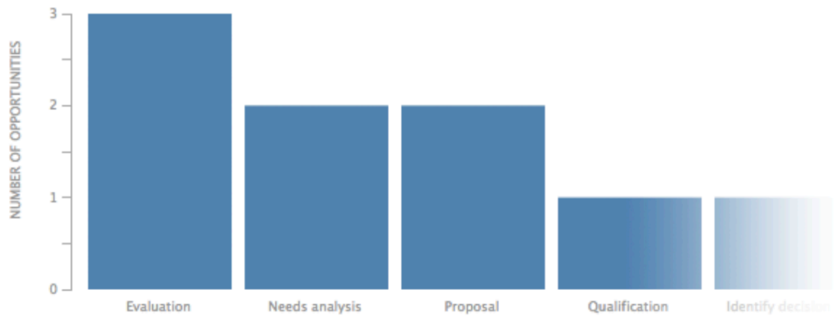
Resilient

Name	Amount	Stage	Target Close	Probability	Assigned
Financial Plan Re: **David Favicchio**	$795 (Fee)	Qualification	Jan 24, 2018	50%	Bill Kelley
529 Plan Re: **Julia Perkins**	$795 (Fee)	Needs Analysis	Feb 7, 2018	70%	Brad Creedon
Transfer Re: **Beverly Davis**	$1,445 (Fee)	Qualification	Feb 7, 2018	80%	Bill Kelley
Trade Re: **Steve Burke**	$1,445 (Fee)	Proposal	Feb 9, 2018	40%	Brad Creedon
Kevin's Retirement Plan Re: **Kevin Anderson**	$1,995 (Fee)	Presentation	Feb 22, 2018	60%	June Kimura
Annuity Re: **John Hanley**	$1,995 (Fee)	Proposal	Jan 22, 2018	70%	Brooke Davis
401K Rollover Re: **Beverly Davis**	$1,995 (Fee)	Proposal	Jan 23, 2018	50%	Bill Kelley
SEP IRA's Re: **William Jones**	$1,445 (Fee)	Needs Analysis	Jan 31, 2018	50%	Brad Cree

GRAPHICAL VIEWS

Visualize your book of business.

View your opportunities by users, stages, and closing dates to see where you stand.



PIPELINE MANAGEMENT

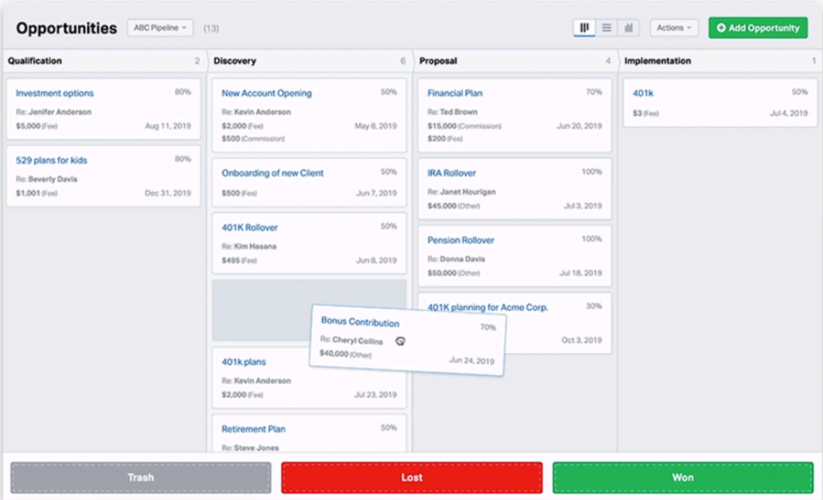
Know where you stand on opportunities with each client and prospect.

Enter notes, status updates, and customized stages about opportunities you have to grow your book of business.

KANBAN BOARD

Slide right to win!

Easily track and manage your customized opportunities with a kanban board interface.

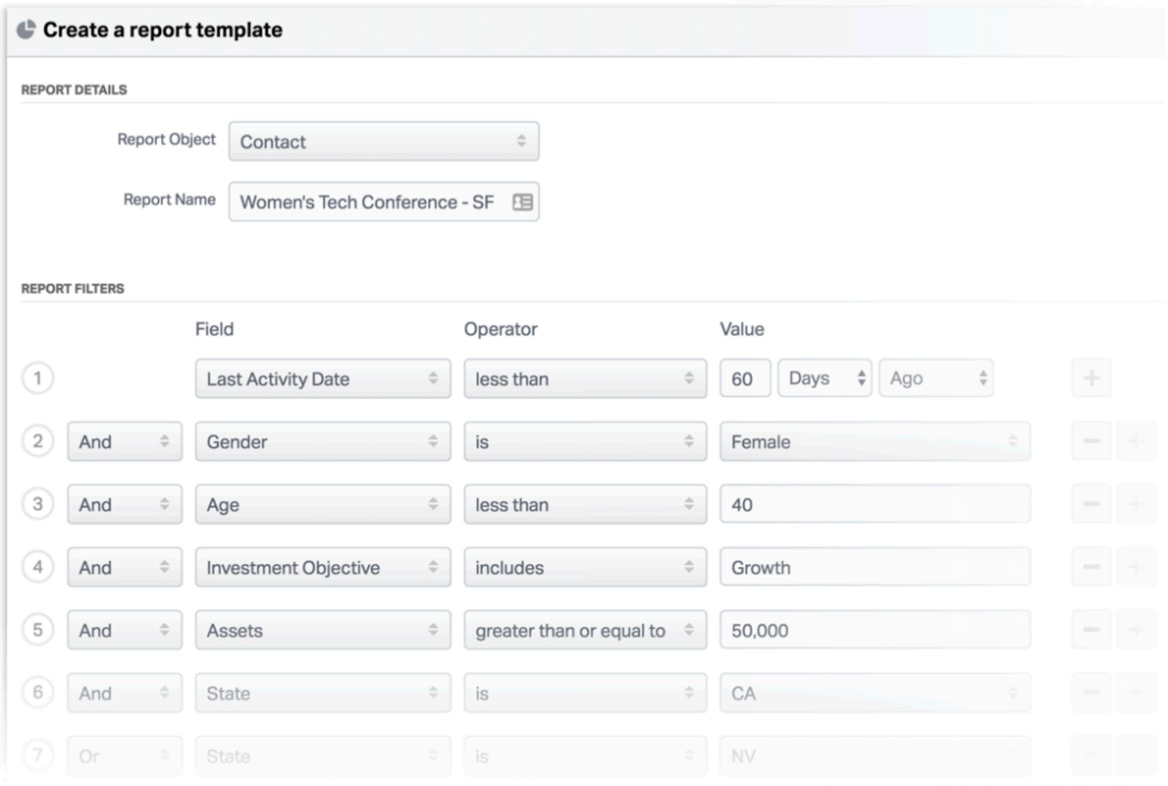


REPORTS ENGINE

Advanced CRM Reporting

Wealthbox is built with a powerful yet simple to use “reports engine” that allows advisors to dynamically generate and save customized CRM reports for better analytical insight into their practice.

Users can create templates – with multiple and various “criteria patterns” – and run their own customized reports on-demand to dig deeper in the underlying data for analysis. Easy exporting to Excel/CSV and made available to print, too.



Resilient

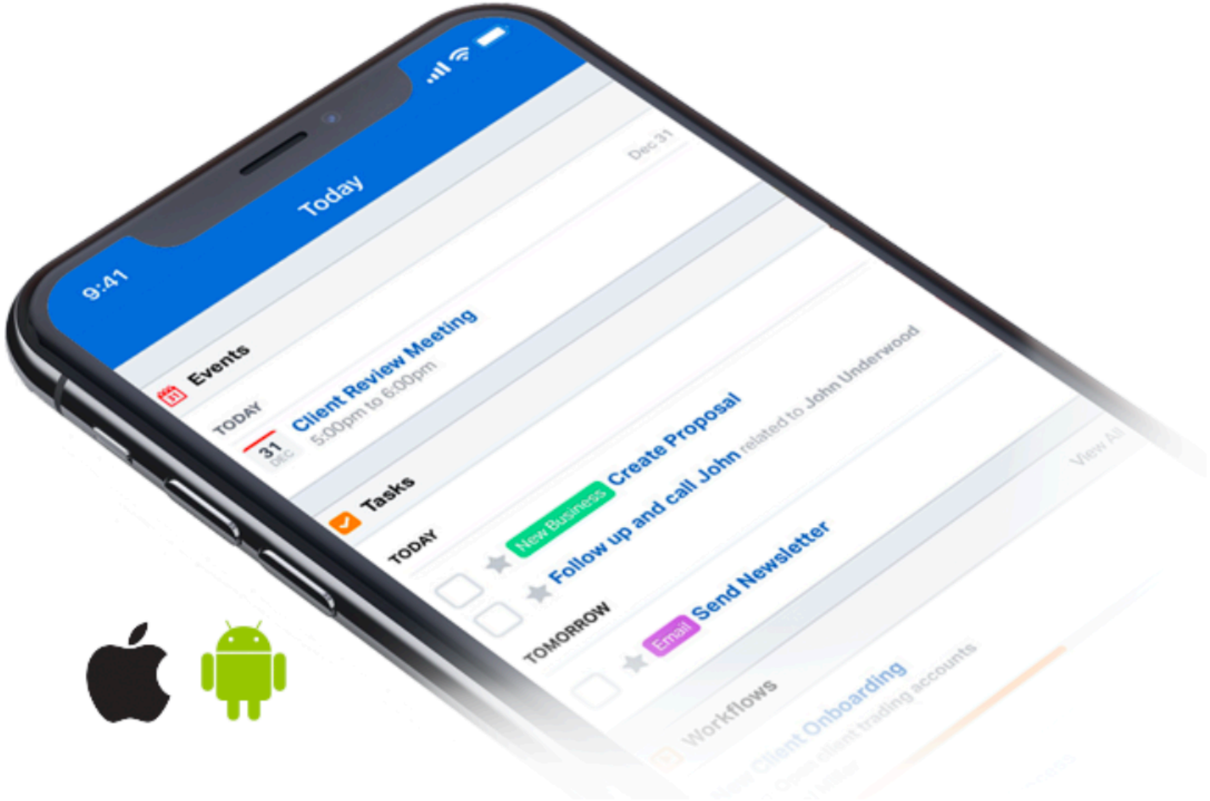
COMPANION MOBILE APP

Full-featured CRM for the on-the-go financial advisor.

Lookup contacts, enter notes, schedule meetings, and see what's happening at the office in the activity stream. The Wealthbox mobile app is fully synced with your web-based Wealthbox account.

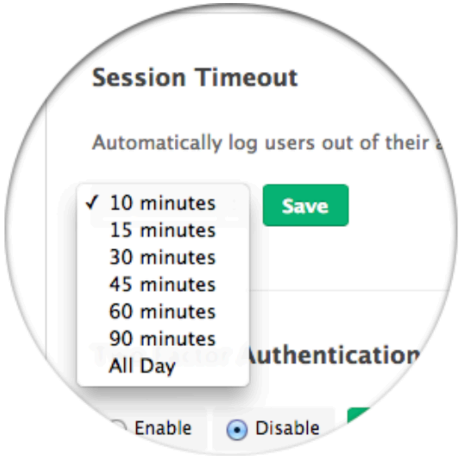
Download on the App Store

GET IT ON Google Play



Resilient

Wealthbox Security



256-BIT ENCRYPTION OVER SSL

Bank-level encryption to safeguard your data.

Our application traffic runs entirely over 256-bit encrypted SSL (https). Passwords are hashed before storing using bcrypt with a cost factor of 10 and application credentials are kept separate from the database and our code base.

TWO-FACTOR AUTHENTICATION

Extra security for your Wealthbox account.

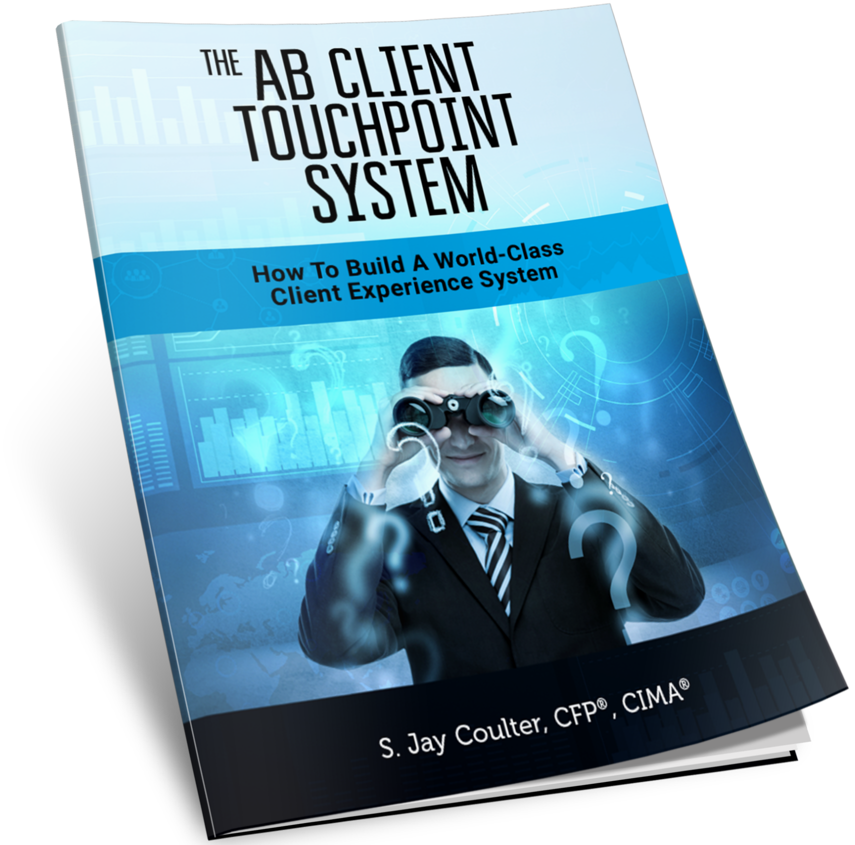
In addition to your username and password, you can enter a code from your mobile phone, adding a extra layer of security for your account.

SESSION TIME-OUT

More protection to keep out snoopers.

Set the session timeout to your preference which will automatically logout a user when there's no activity.

The AB Client Touchpoint System™



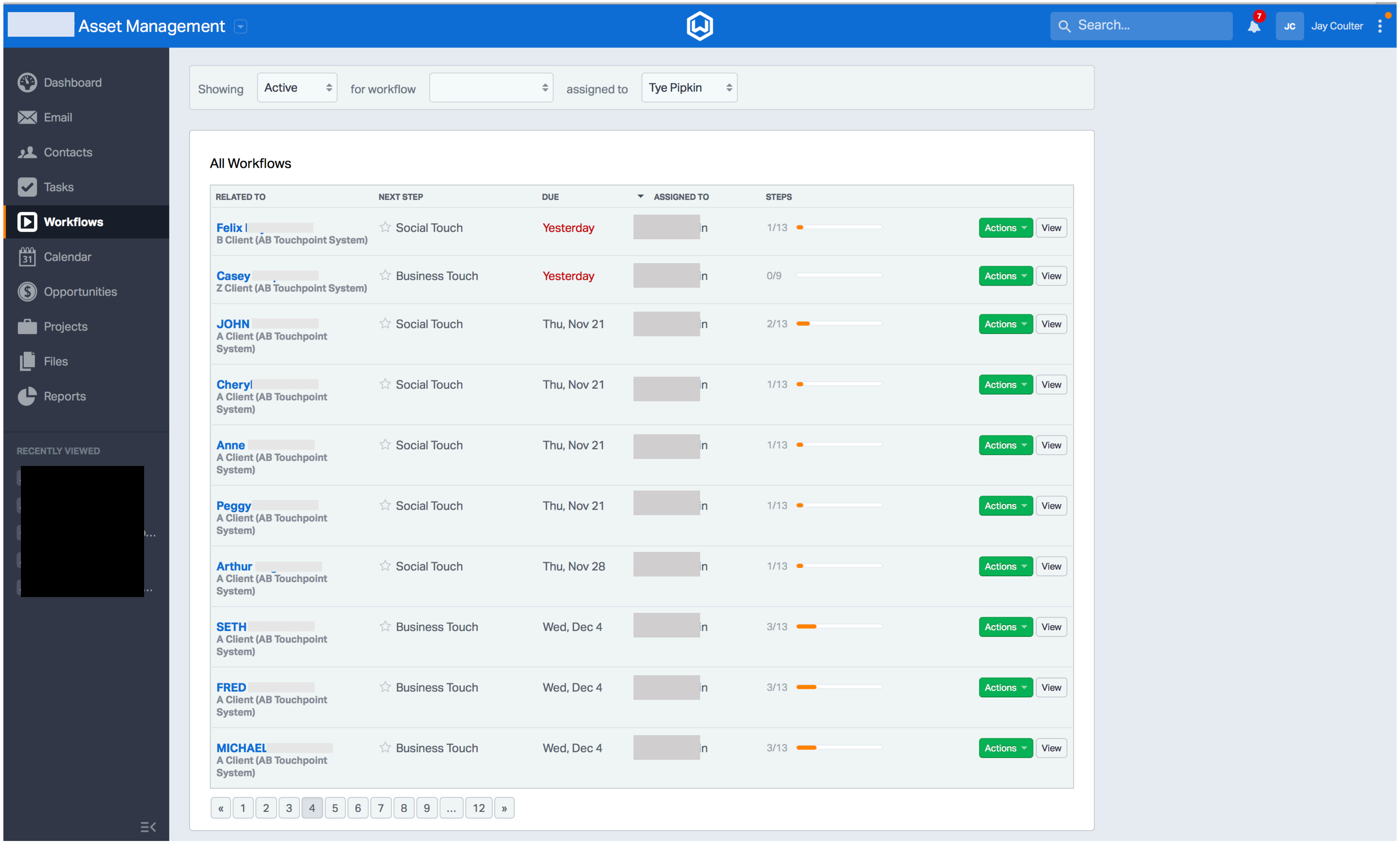
A Four Step Process To A Robust Client Experience

1. We build a quantitative analysis of your book.
2. Households are segmented into A, B, Z's.
3. The advisor makes the subjective changes to the segmentation.
4. We build the touchpoints into your Wealthbox.

Resilient

With the **AB Touchpoint System™** & **Wealthbox**, your client interactions are mapped out and set-up in your Wealthbox account.

This systematized approach to your client experience results in you having more free time to grow your business!



Resilient

Pricing

Company Wealthbox Set-up: $1,000*

Advisor Wealthbox Set-up: $1000 per advisor, $250 per assistant

The AB Touchpoint System Integration: $1000 per advisor (optional)

Jay Coulter, CFP®, CIMA® builds every Wealthbox and AB Touchpoint System™ for his clients. Nothing is outsourced. Jay is an investment strategist and business consultant to financial advisory teams and firms. Jay is also the host of The Resilient Advisor Podcast and the author of *The Resilient Advisory Business*, *The Resilient Advisor* and *Conquer Worry.*

*Does not include Wealthbox technology charges