THE AE WEALTH MANAGEMENT EXPERIENCE

COME SEE WHAT'S WAITING FOR YOU.

Choosing AE Wealth Management means choosing an all-encompassing platform. No more silos of technology, service, planning, marketing and compliance. When you come on board, you'll unlock a wealth of resources and services designed to help you serve clients as completely as possible.

COME SEE WHAT'S WAITING FOR YOU.

DEDICATED SALES AND SUPPORT TEAMS

Integrate your wealth management services team with the annuity and life insurance service teams you already trust to help you make selections for your clients. Joining AE Wealth Management means having one team focused on helping you make holistic recommendations to your clients as part of a complete financial strategy.

When you join AEWM, your wealth management team is composed of:

- A dedicated VP of Wealth Management who provides sales support and coaching
- A dedicated transition team to help make the process of coming on board as smooth as possible
- Planning Support to help you maximize your time by relieving you of the effort it takes to research investment specifics.

TECHNOLOGY

We believe the right technology has the power to make every aspect of your business even more effective.

Here are some of the tools we offer:

- A customized AEWM technology platform, complete with integrated advisor dashboards
- Customizable client portal and dashboards
- Data aggregation with performance reporting
- E-application process with e-signature feature that takes paperwork straight to the custodian

EDUCATION

When it comes to investing, we believe knowledge is power. That's why we help you and your clients stay informed on market happenings and other trends that may affect your clients' objectives.

Here are some of the educational offerings you can expect from AEWM:

- **Advisor training:** Includes a variety of programs designed to inform and train you and your staff.
- **Client videos:** Foster engagement with clients and prospects with videos that help them stay up to date and informed.
- **Seminar content:** Prepared and compliance-approved slides to include in your next client seminar.

RISKALYZE

Built on the academic framework that won the Nobel Prize for economics, Riskalyze pinpoints your clients' risk tolerance so you can help them tailor their investments to their specific goals.
Features include:

- Integration with the forms tool, enabling you to generate client paperwork from Riskalyze
- Lead Generation Questionnaire tool available to obtain a client's risk score

CONTACT YOUR VP OF WEALTH MANAGEMENT

INVESTMENTS

A multibillion-dollar SEC Registered Investment Adviser and a massive research and due diligence firm, Sterling Capital Management is AEWM's outsourced chief investment officer.

While usually only available to large corporate clients, your clients will have access to all of the benefits of this first-class organization through Sterling's partnership with AEWM.

Sterling Capital Management provides your clients with:

- Principles of successful investing through due diligence, asset allocation and market commentary

CUSTODIANS

We work with the following institutions to manage your clients' assets:

- TD Ameritrade Institutional
- Fidelity Institutional Wealth Services

UNIFIED MANAGED ACCOUNTS (UMA)

We utilize solutions across four investment domains: Passive, active, alternative and insurance.

- **Integrate investment strategies and vehicles:** Separately managed accounts, mutual funds and exchange-traded funds.

SERVICE

Delivering excellent support services helps you with every aspect of your practice. Here are some of the support services AEWM:

- New business and operations support
- Transition assistance
- Compliance
- Billing

MARKETING

We've heard many advisors say marketing could be their full-time job. It's not surprising given the various layers, platforms and communication that are involved in an effective campaign. At AEWM, we offer a variety of marketing services so you can focus on what you do best: meeting with clients and prospects. Our marketing services span multiple mediums:

COMMUNICATION

- Text alerts: Portfolio information for clients; AUM information for you
- AEWM mobile app: Another way to keep you and your clients informed. Features include:
  - Secure account access
  - Reporting
  - Custom commentary and video
  - Push notification
  - Contact features
- Customizable client statements

WEALTH WEBSITE

- Client-facing content
- Lead generation funnels

CONSUMER CONTENT

- Written, designed and recorded client communications that can be easily customized to your brand

QUARTERLY COMMENTARY

- Inform your clients about market developments and their impact through video and written commentary

YEARLY MARKET VIDEO

- A custom-branded client video detailing the market fluctuations of the past year as well as your client's specific portfolio movements

AT 866-363-9595 TO GET STARTED TODAY!

AE WEALTH MANAGEMENT

aewealthmanagement.com

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