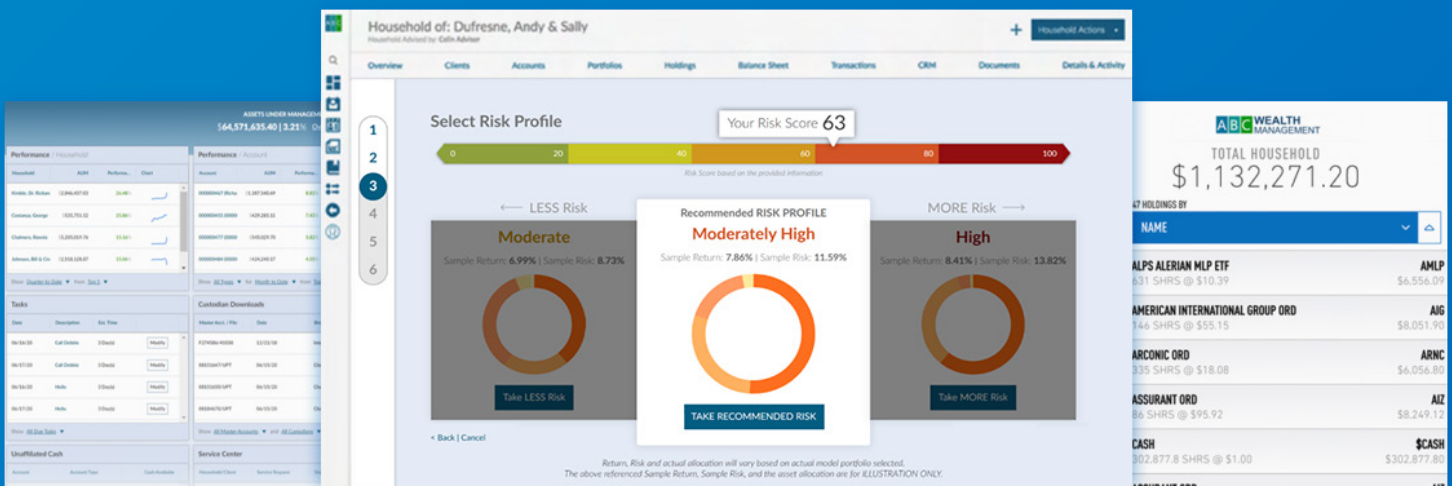


What True Independence Feels Like

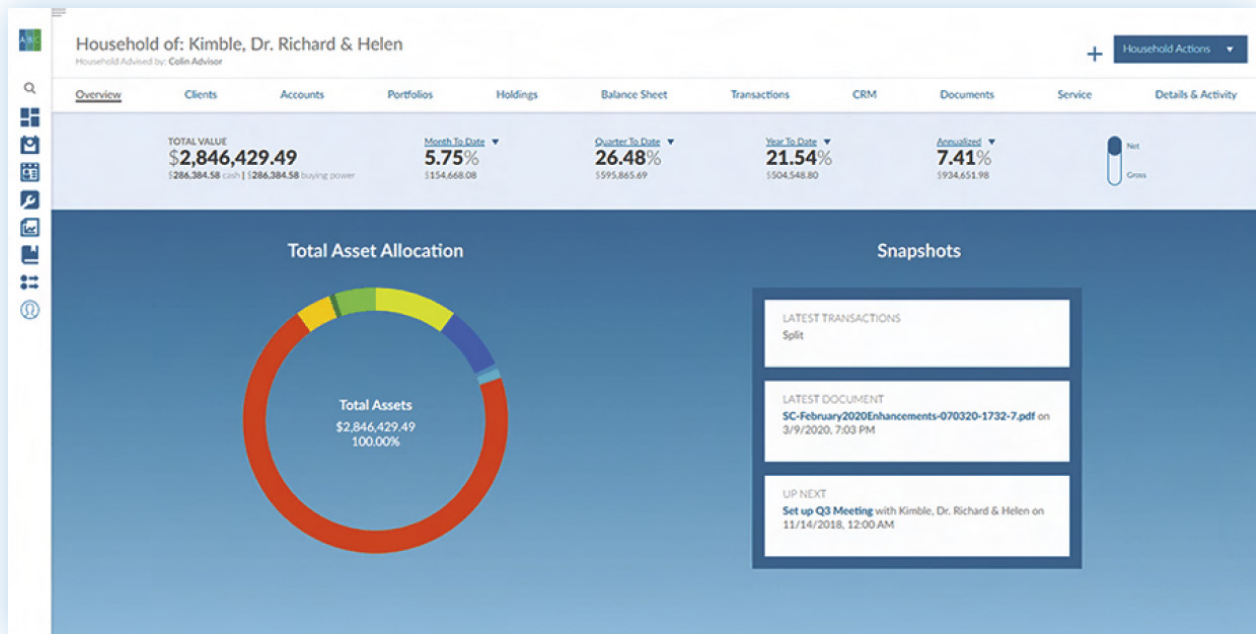
Freedom Advisors offers a complete portfolio management solution, comprehensive outsourcing of operations, and high-touch service to help advisors like you run efficient practices and seek to deliver superior outcomes to your clients.



The screenshot displays the Freedom Advisors interface for a client named "Household of: Dufresne, Andy & Sally". The main focus is the "Select Risk Profile" screen, which shows a "Your Risk Score 63" on a scale from 0 to 100. The recommended risk profile is "Moderately High" with a sample return of 7.84% and a sample risk of 11.59%. Other options include "Moderate" (6.99% return, 8.73% risk) and "High" (8.41% return, 13.82% risk). The interface also includes a sidebar with navigation options like Overview, Clients, Accounts, Portfolios, Holdings, Balance Sheet, Transactions, CRM, Documents, and Details & Activity. A secondary window shows a list of holdings for "ALPS ALERIAN MLP ETF" and "AMERICAN INTERNATIONAL GROUP ORD".

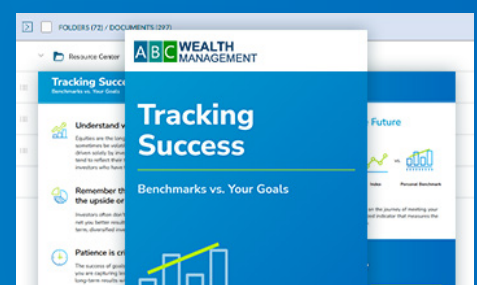
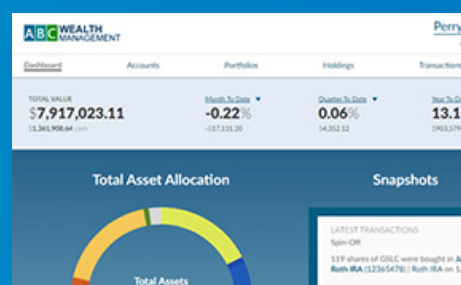
Finally, Do Business the Way You've Always Wanted

You want control over your business to do what's best for your clients. Having your own platform provides access to an expansive investment offering, options to select your custodians, and service and consulting teams working every day on your behalf. The freedom to do business your way is within reach.



We are an established provider of sophisticated investment management solutions. Independent advisors rely on Freedom Advisors to construct, implement and manage investment portfolios, as well as support and optimize their practices. By outsourcing due diligence, planning options, risk mitigation, and portfolio management, advisors like you have more time to build and strengthen client relationships.

Everything White-Labeled With Your Brand



600 Models from 100 Model Providers

True independence for advisors in the category of investment solutions means choice and objectivity. With Freedom Advisors, you select from an expansive model marketplace.

Model Marketplace

Recognized, reputable investment portfolio model providers create an exclusive list where select diversified models are one click away.

Due Diligence & Selection

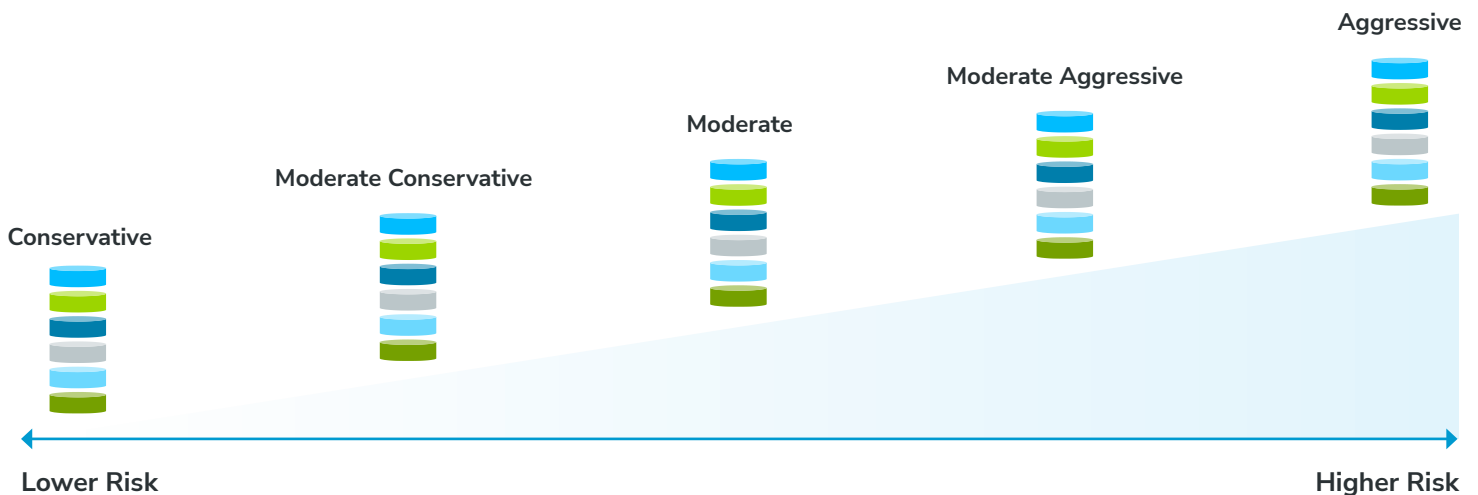
Each investment manager undergoes initial and ongoing rigorous reviews by our due diligence team and investment committee to ensure they meet our quality and performance standards. Portfolio diversification can be achieved through manager selection, blending size, styles, strategies, and geographies in pursuit of complementary, low correlation holdings.





55 EQIS UMA & ETF Models

Our models are each built to address a unique investment objective, supported by a professional investment team and a sophisticated risk management process. Whether an investor’s risk tolerance is conservative, aggressive, or somewhere in between, you can select a model that suits their needs.



Everything in One Place: Your Central Command



Robust, Integrated Service Center

Easily accessible across the platform, our service center makes it easy to submit instructions, track progress, make changes, enter notes, and communicate with your Freedom team.

We also provide experienced, expert, service-minded operations staff who get to know your practice and always answer the phone. We are hands-on and laser-focused on providing personal service. When you call, we know your name because to us you are more than a number.

Service For	Account	Service Type	Ticket #	Next Action	Status
Dufrene, Andy & Sally (E)	000000457 (000000457) Individual Taxable	Cash Monitoring	CM308 10007	Good Until Cancelled	Active
Costanza, George (E)	000000455 (000000455) Contributory IRA	Cash Monitoring	CM308 10034	Good Until Cancelled	Active
Mc-Ronick, Chaim (C)	000000543 (Schmers, Ronald) Rollover IRA	Systematic Withdrawal (Recurring)	SW308 11113	8/10/2020 Next Trade Date	Active
Clancy, Jack & Malory (E)	000000171 (Clancy, Malory) Rollover Roth IRA	Systematic Withdrawal (Recurring)	SW308 11128	10/7/2020 Next Trade Date	Active
Albins, Donald & Debbie (E)	000000583 (Albins, Debbie) Contributory IRA	Systematic Withdrawal (Recurring)	SW308 14883	10/13/2020 Next Trade Date	Active
Schulze, William & Margaret (E)	000000483 (Schulze, William) Individual Taxable	Systematic Withdrawal (Recurring)	SW308 14313	Ends after 4 occurrences	Active
Costanza, George (E)	000000455 (000000455) Contributory IRA	Trade Hold (Recurring)	TH308 14887	4/24/2020 Ending Date	Active
Milly, Martha & Rebecca (E)	000000477 (000000477) Individual Taxable	Trade Hold (Recurring)	TH308 14955	Good Until Cancelled	Active
Milly, Martha & Rebecca (E)	000000479 (000000479) Individual Taxable	Trade Hold (Recurring)	TH308 14956	Good Until Cancelled	Active
Kinble, Dr. Richard & Helen (E)	000000468 (Kinble's IRA) Contributory IRA	Auto Invest (Recurring)	AI308 16658	Good Until Cancelled	Active
Kinble, Dr. Richard & Helen (E)	000000465 (Kinble's Taxable) Non-Qualified	Trade Hold (Recurring)	TH308 16659	Good Until Cancelled	Active
Dufrene, Andy & Sally (E)	000000457 (000000457) Individual Taxable	Systematic Withdrawal (Recurring)	SW308 10003-7/2/2020	7/2/2020 Trade Date	In Progress

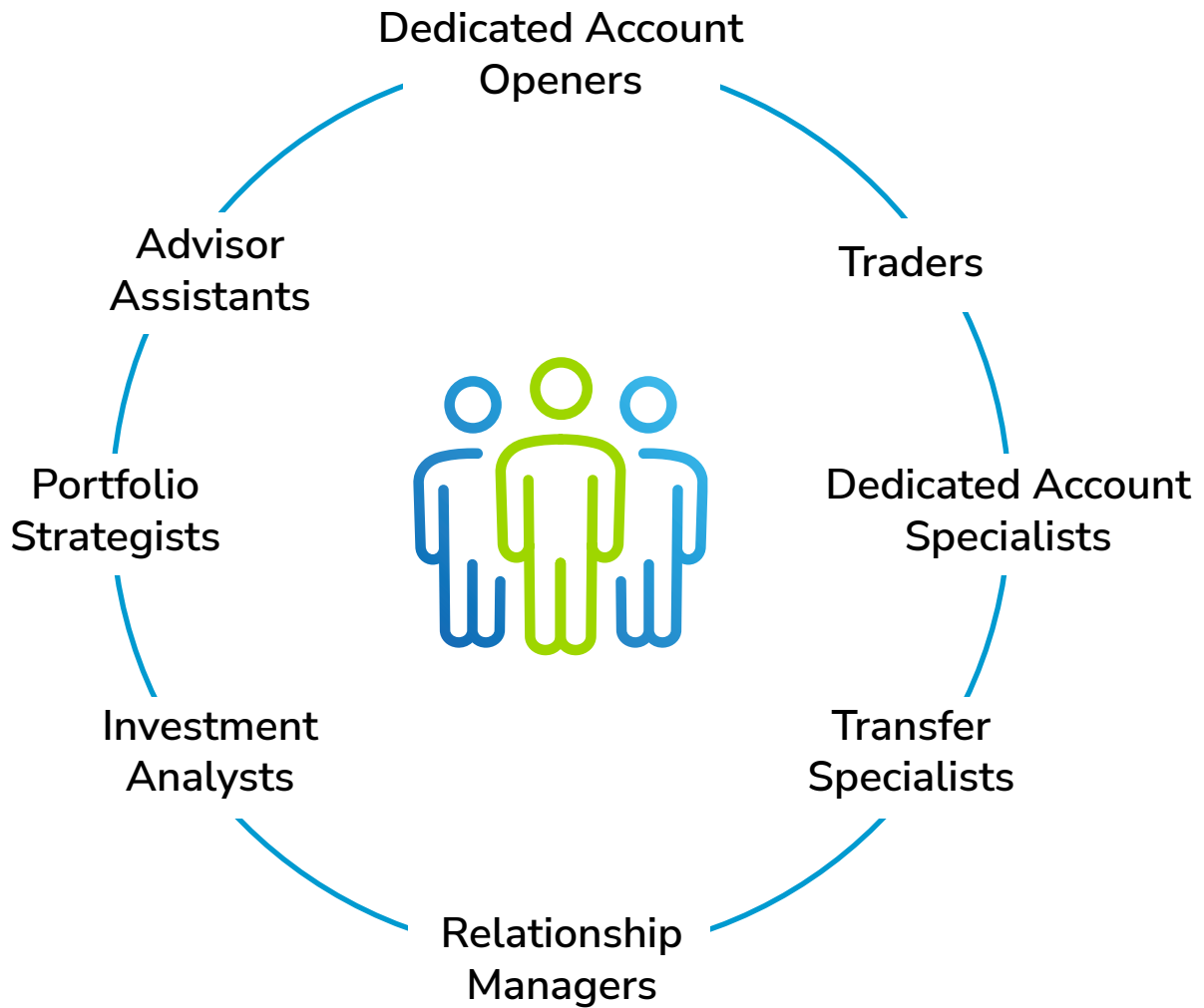
Custodian Choice

Select from fractional share and whole share custodians.

**Goldman
Sachs**

charles
SCHWAB

Industry-Leading Freedom-to-Advisor Partnering Ratio



TAMP Due Diligence Checklist

Component		Option B	Option C
Comprehensive, Seamless Platform	✓		
Does Not Need to Integrate Multiple Technologies	✓		
Modern Technology	✓		
Available Immediately and Easy to Onboard	✓		
Navigational Ease	✓		
Operational Ease	✓		
Digital Account Opening	✓		
Investment Planning Tool	✓		
Proposal and IPS Generator	✓		
Model Marketplace	✓		
Wide Selection of Models	✓		
Wide Selection of Money Managers	✓		
Portfolio Accounting System	✓		
Robust Performance Reporting	✓		
Deep Custodian Integration	✓		
Offers Multiple Custodians	✓		
Integrated Billing System	✓		
Position Billing Exclusion Options	✓		
Integrated Order Entry and Trading	✓		
Portfolio Rebalancer	✓		
Reserve Cash Functionality	✓		
Data Aggregation	✓		
Advisor Document Storage	✓		
Client Document Storage	✓		
CRM	✓		
Client Portal	✓		
Private Label to Advisor	✓		
High Ratio of Live Staff to Advisors (Service Culture)	✓		
Our Business Would Be Important to Platform Provider	✓		
Organizational Strength & Resources	✓		
Attractive and Flexible Fee Structure	✓		
This Partner Gives Me Mobility and Optionality	✓		

Unlock True Independence. Schedule a Consultation.

[Get Started](#)

600

Model Portfolios

100

Money Managers

800

Independent Advisors

With Freedom Advisors, you're in control.
Get started today.



freedomadvisors.com ■ [1-800-949-9936](tel:1-800-949-9936) ■ contact@freedomadvisors.com

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