

SmartLink for Investigo

Fully automated data downloads at no additional cost

SmartOffice® users can receive automated downloads from Investigo's powerful data aggregation tool using SmartLink for Investigo, a free add-on module to SmartOffice. This streamlined solution combines advanced practice management and accurate, aggregated investment account data in a single, integrated system.

Available to any advisor whose broker-dealer is contracted with Investigo, SmartLink for Investigo is specifically designed to meet the needs of today's busy advisor. This pre-configured data integration brings together the power of two industry-leading solutions, SmartOffice and Investigo, by pulling consolidated client investment and account data directly into the advisor's SmartOffice desktop — without any action by the user. The automatic daily download pulls client-specific data into SmartOffice and reconciles the information to ensure accuracy.

Using this single view of all your clients' assets, you can quickly and easily prepare consolidated financial reports, analyze financial performance, drive recommendations, and uncover new opportunities to meet your clients' needs. And by bringing the consolidated data provided by Investigo directly into SmartOffice, you can eliminate redundant data entry to save time and reduce

errors, as well as quickly and easily generate detailed client reports and apply them directly to your practice management processes — any time, day or night, from virtually anywhere in the world.



DATASHEET

- Turn investment and account data into powerful customer service tools
- Eliminate unnecessary data entry
- Reduce the time, cost, and risk of custom integration

SmartLink

f o r I n v e s t i g o

SmartLink for Investigo provides these valuable benefits:

- > **Fully web-based solution** provides client, account, and position information anytime, anywhere
- > **Automated data downloads** pull consolidated data directly into SmartOffice, with no action required by the user
- > **Integrated, reconciled data** is available to generate reports, identify cross-sell opportunities, and support the creation of financial plans and illustrations
- > **Pre-configured integration** makes it easy to get the SmartLink in place and start receiving your Investigo downloads right away

Take the next
step toward
superior service,
greater growth,
& better business:

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for Insurance Agents
- **SmartOffice®**
Premier Edition for
Financial Advisors
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