Enhance Client Communication

Importance of models:

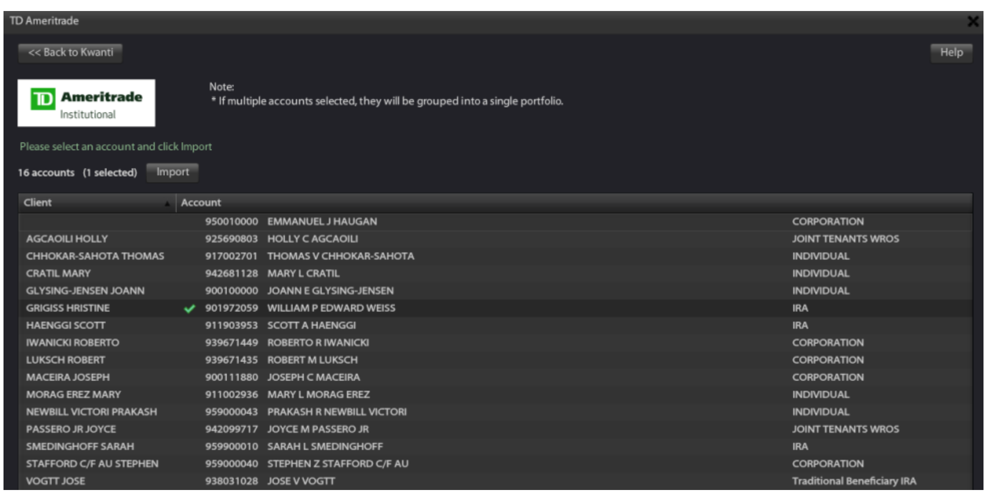
In parts 1 (Building your Models) and 2 (Prospecting with Kwanti) of our Methodology series, we discussed how advisors can take advantage of Kwanti to enhance the internal functions of their firm. The last piece of the puzzle is using Kwanti to enhance your client communication.

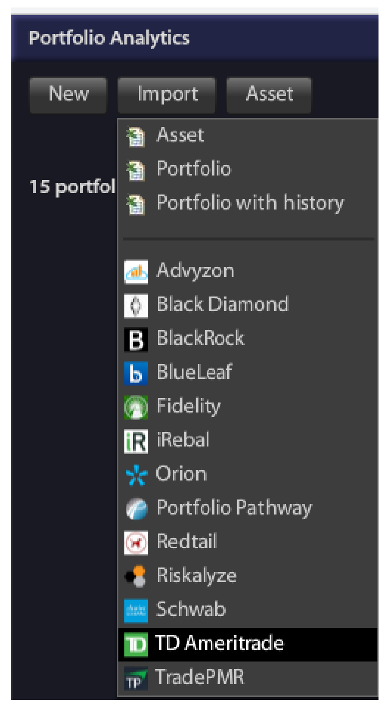
1: Account Integration

There is no shortage of Fin-Tech tools for financial advisors to take advantage of. Kwanti is constantly working to develop new relationships with partners to make integrating your clients accounts into Kwanti that much easier.

a. Integration Partners

With any of our current partners, Kwanti users have the ability to link their client accounts from our partner to their Kwanti account. A **linked account** has its positions automatically imported from the custodian every time you start Kwanti, eliminating manual transfer operations.





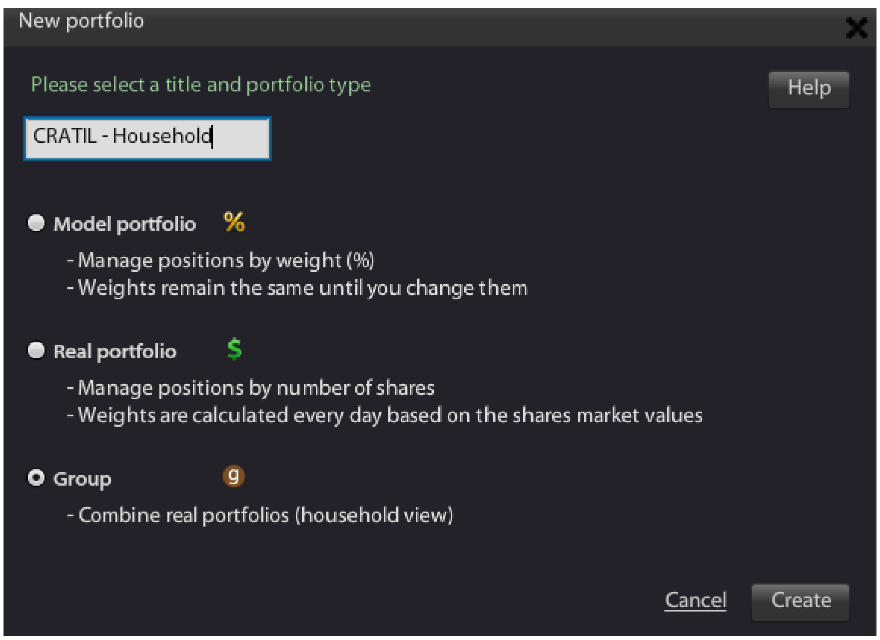
As an example, current Kwanti user Brandon Grundy is a big fan of Kwanti's integration with TD Ameritrade's iRebal system and Orion.

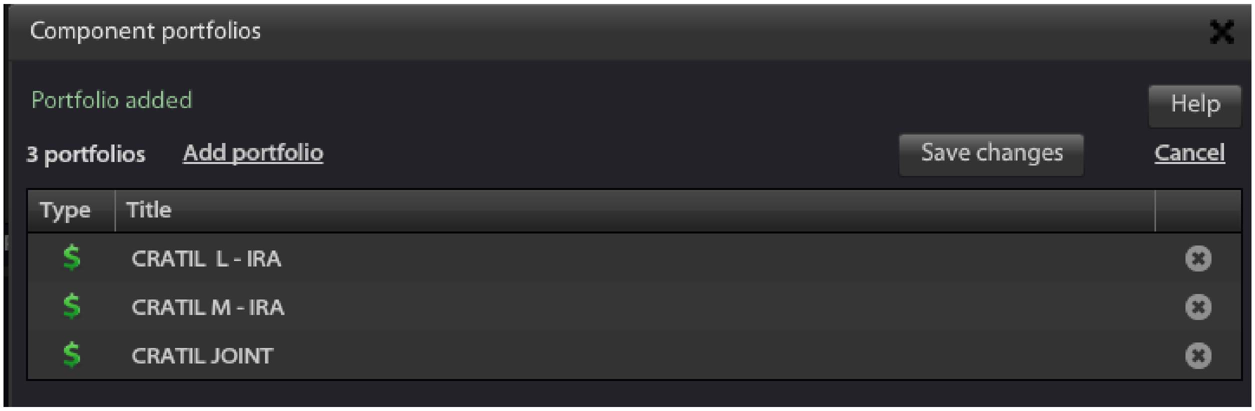
> *"We can easily bring in portfolios from Orion into Kwanti to make model comparisons," he says. "From there, we can easily push them into iRebal to make the tweaks to ensure the rebalancing is accurately and quickly completed." These three systems work hand-in-hand and make our business a lot more productive."*

A list of our current integration partners can be found on our website at kwanti.com/partners

b. Grouping

In many cases, advisors manage multiple accounts for a family. For example, you may manage a couples joint brokerage account as well as each spouses IRA accounts. In addition to having the ability to look at these on the individual account level, you can also group accounts to view them at a household level.





2: Elegant Presentations

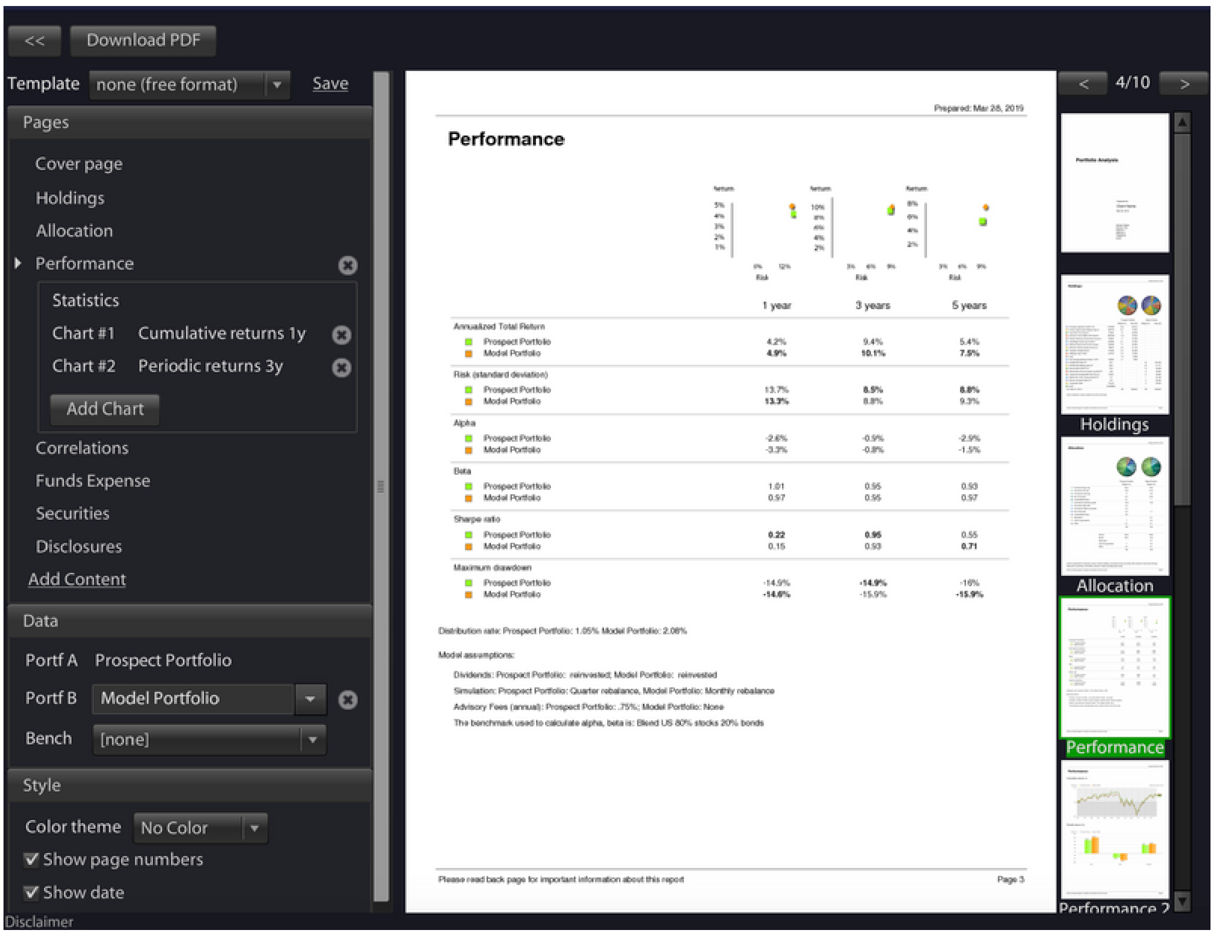
Depending on both the preference of you as the advisor and the type of client you are working with, Kwanti give you a variety of elegant presentation options.

a) Interactive Presentation

You may have a client who is a bit more tech savvy clients and prefers to go over the details in a engaging, interactive way. This is an opportunity to showcase a prospect's or client's portfolio using real-world data on a tablet, laptop, web conference or projected screen.

b) PDF Report

On the other hand, some clients may prefer a customized PDF report that they can print out and review. Kwanti supports fully customizable PDF reporting which is linked to the software. The advisor can make changes directly on the PDF and those edits will be saved in the advisor's Kwanti account as well as in the printed report received by the prospect.



What current advisors Have to say about Kwanti's presentation options.

John Garrity
Founder
Peak Wealth Management

What stands out to Garrity about Kwanti is its visual displays, rich interface and pleasing aesthetics. **"The visual experience of Kwanti is so superior to any other platform out there**. We use it every day and when we show it to clients and prospects in our conference room, they are immediately impressed with our capabilities and respond well to our recommendations.