

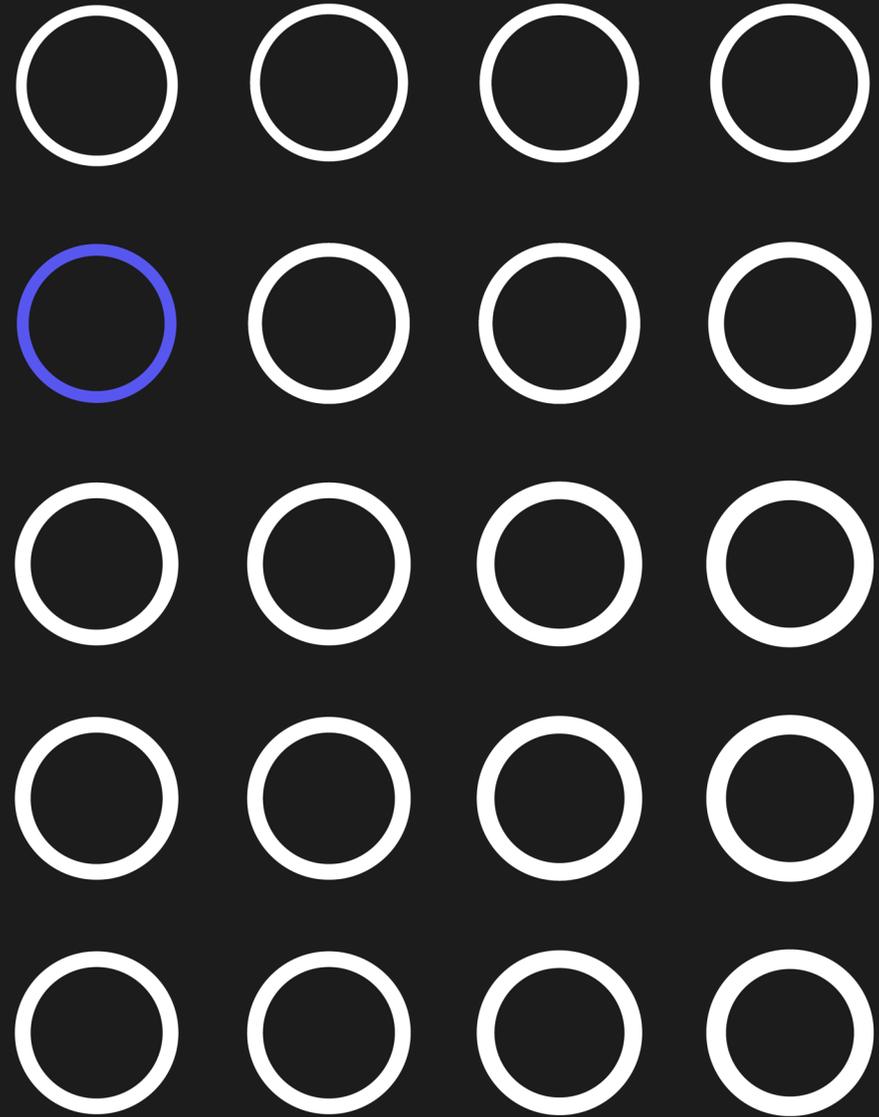


Company Overview November 2024

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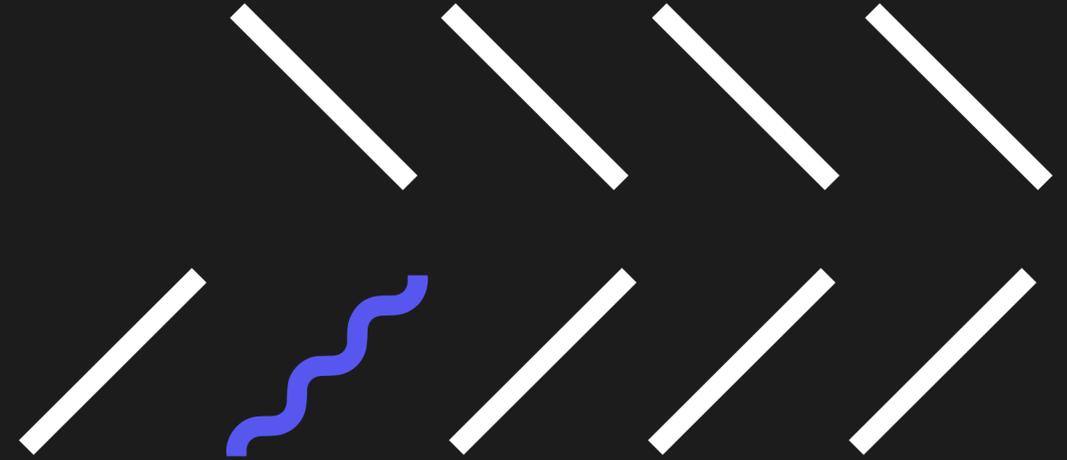
# We make it easy for financial advisors and institutions to be digital wealth leaders.

Give your clients and advisors the digital experience they want. Get the workflows and process automations you need to grow at scale.





# Become the Disruptor.



Hybrid Digital Advice	Self-Directed Investing	finTAMP	Digital Marketplace
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FusionIQ One is a true end-to-end, digital platform with four seamlessly integrated modules that deliver an unmatched breadth and depth of benefits and features.



# You Win the Digital Game with FusionIQ One.

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## Workflows That Actually Work

True end-to-end workflows means you can profitably scale your growth, seamlessly integrating new revenue streams.

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## Pay as You Grow

Integrated modules means you pay for what you need, when you need it.

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## Say Goodbye to Legacy Systems

Our all-in-one platform let's you say goodbye to legacy software in your tech stack, reducing costs while increasing efficiencies.

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## Zero to Digital

Our leading technology and experienced team can give you an award-winning white-label platform in as little as six weeks.

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## No Long-Term Custodian Contracts

Our multi-custodian platform gives you exposure to a wide range of custody options at attractive pricing.

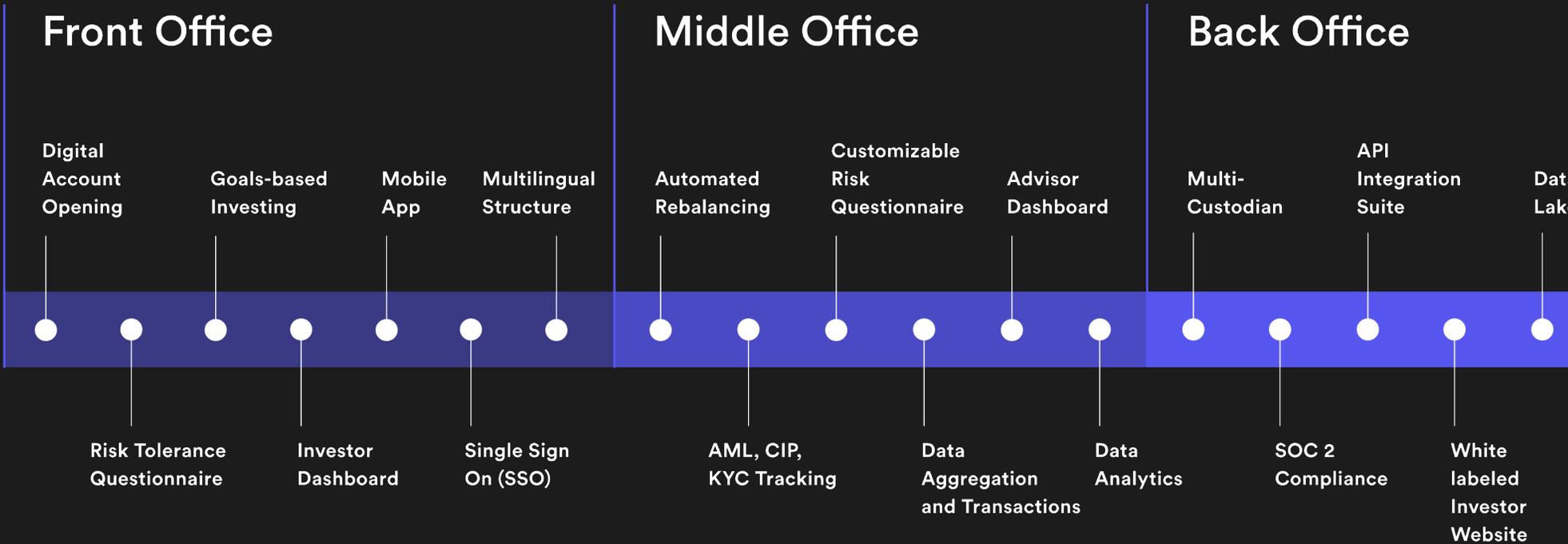
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## Onboard Fast

Onboard clients in as little as five minutes on many of the most trusted custodians.

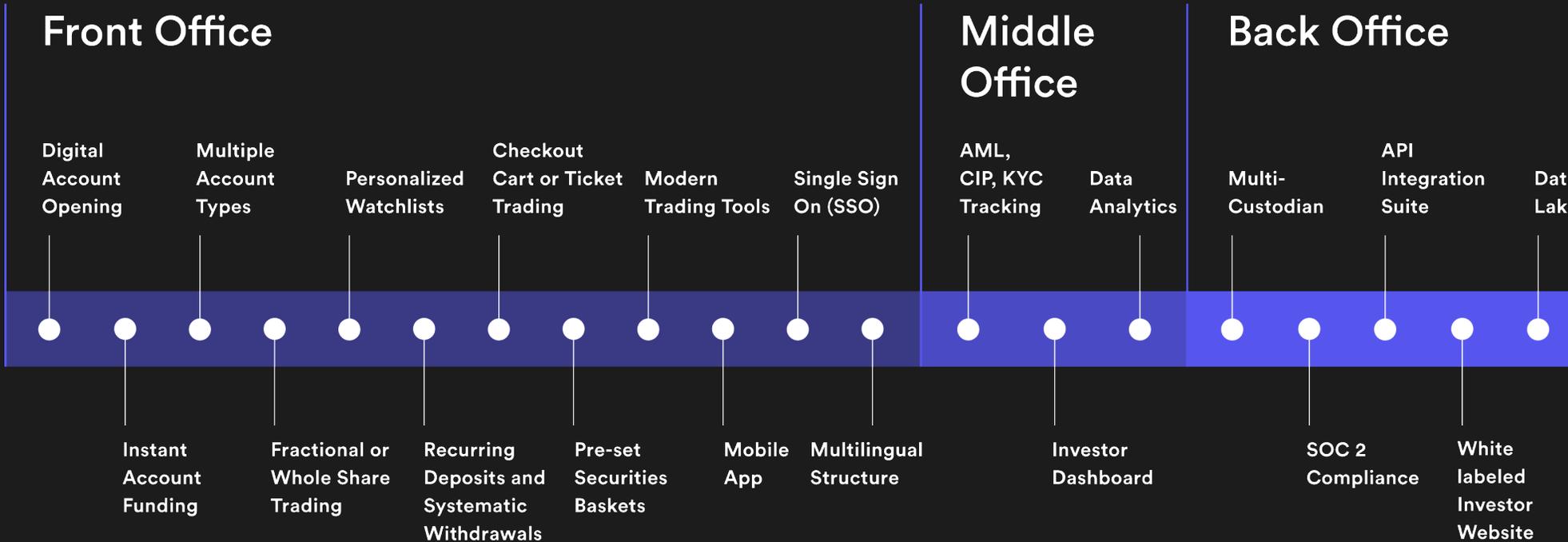


# Hybrid Digital Advice



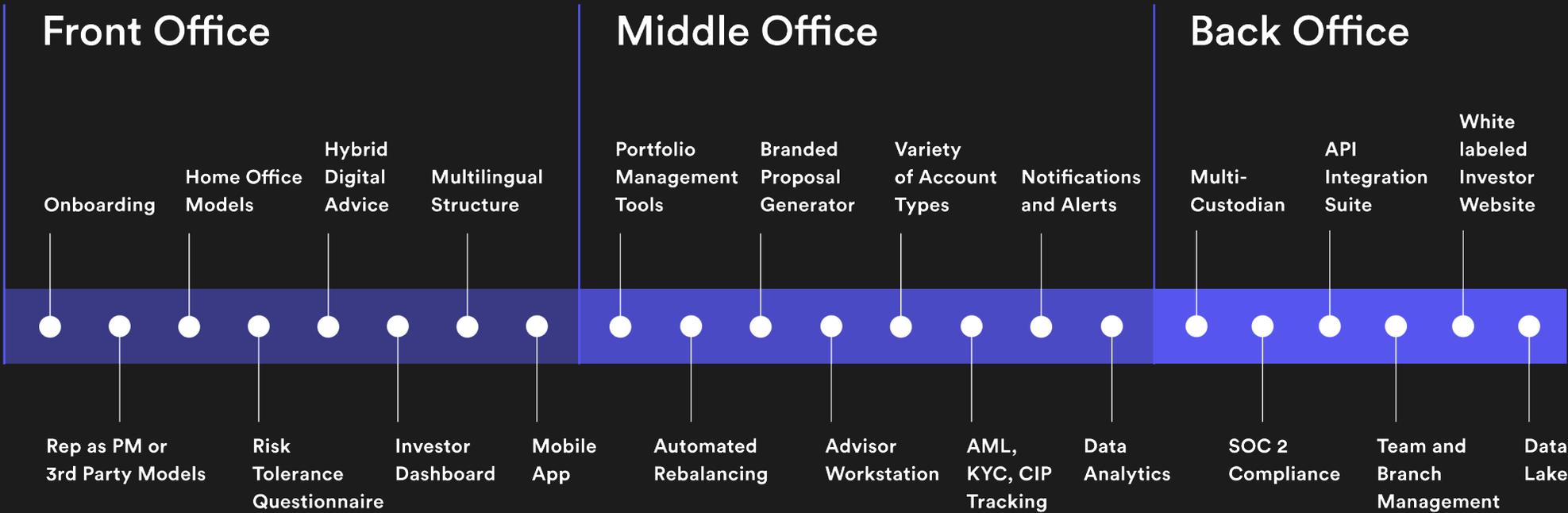


# Self-Directed Investing





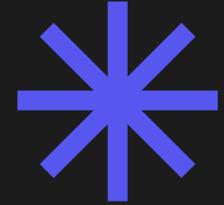
# finTAMP





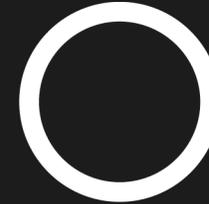


# The Flexible, Easy to Implement Products You **Need to Win.**



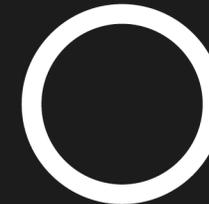
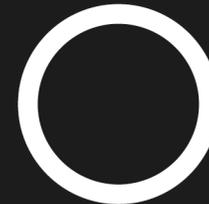
**\*. fusionIQ**  
Journey

**\*. fusionIQ**  
Market One



**\*. fusionIQ**  
TAMP+

**\*. fusionIQ**  
Freedom



**\*. fusionIQ**  
TAMP+



The digital experience  
your clients and advisors  
want. **The investing  
services you need.**

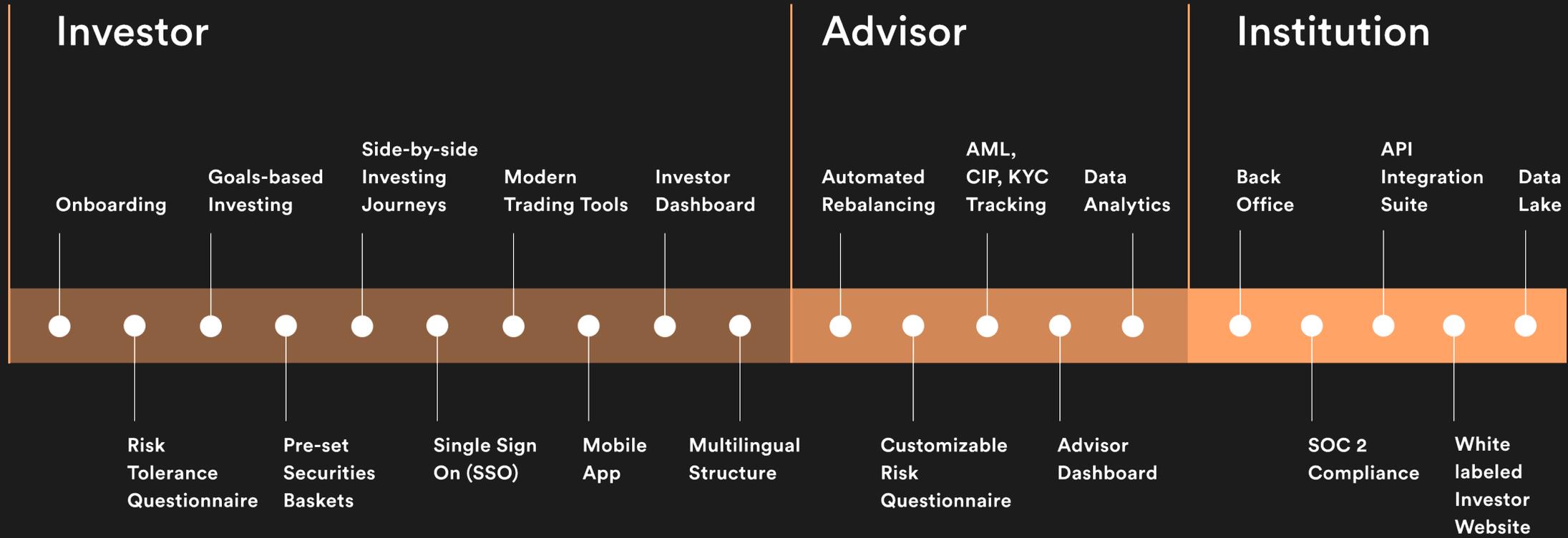
Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, **FIQ Journey brings together Hybrid Digital Advice and Self-Directed Investing in a single investor journey.**

**FIQ Journey**





# FIQ Journey

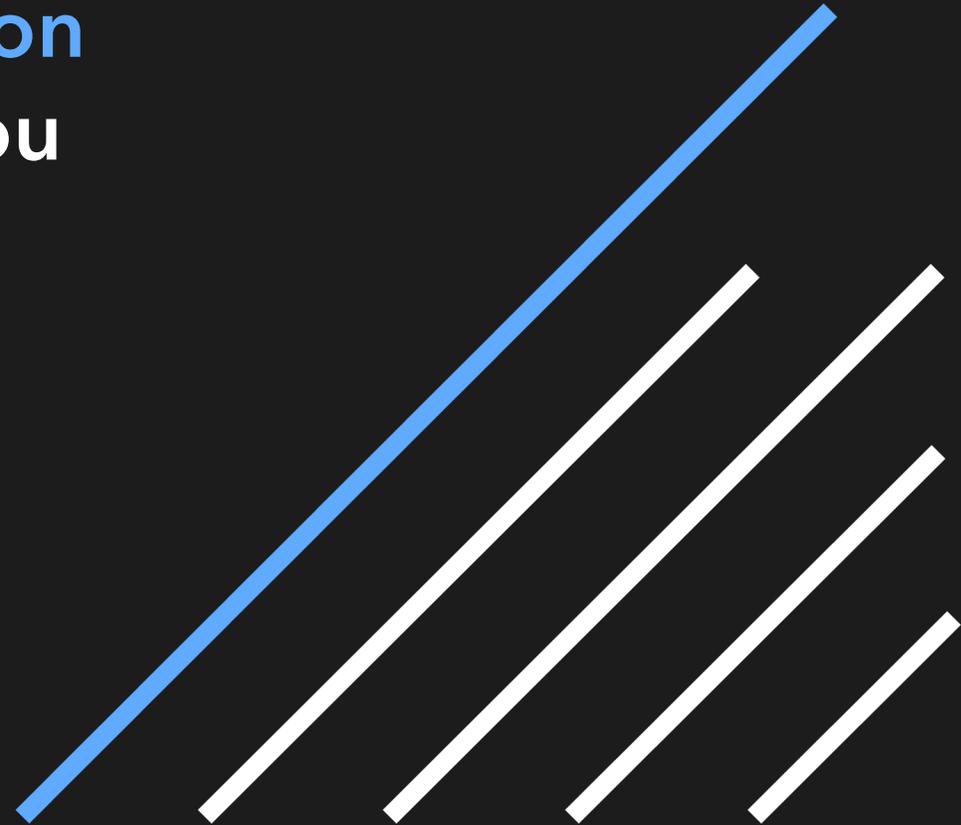




## Get the **portfolio diversification** investors need at the scale you want to grow.

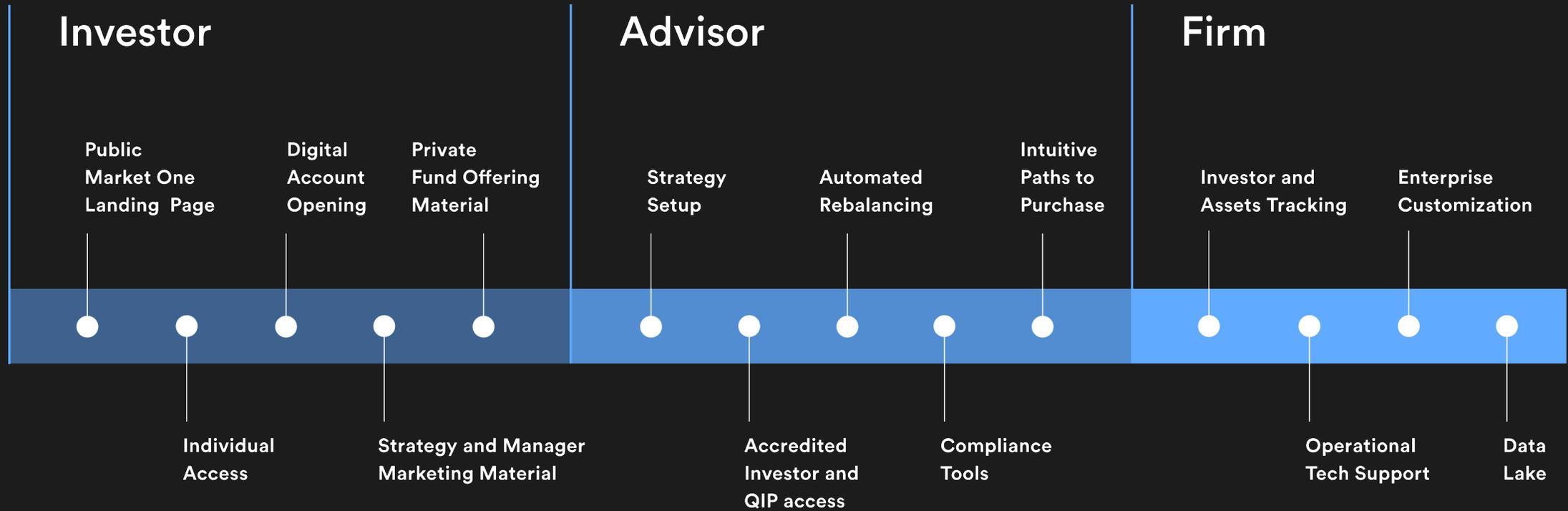
Digitally onboard to a **single market** to find and invest in **digital assets, SPV and alternative funds, private investments and ETFs** at a lower cost. Create unified advisor and client portals and produce personalized portfolios at scale. And asset managers have a digital channel to distribute their products.

**FIQ Market One**





# FIQ Market One





Get the easy on-ramp to  
greater efficiency and higher  
productivity at a lower cost  
than a conventional TAMP.

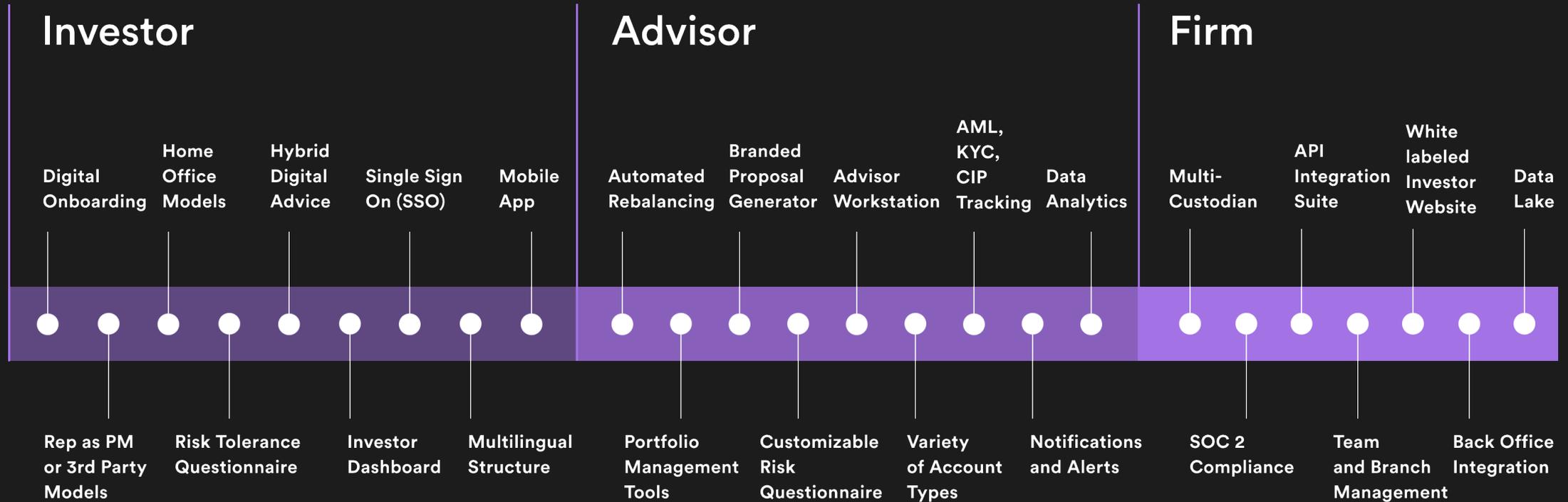
FIQ TAMP+ is the first true digital TAMP, integrating our end-to-end wealth management platform with advanced portfolio management technology. FIQ TAMP+ provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale for profitable organic growth.

**FIQ TAMP+**





# FIQ TAMP+

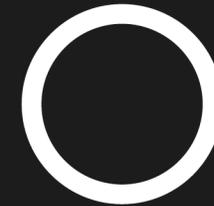
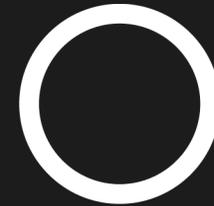




# Make the **fast break to independence** with the **breakaway advisor platform** that puts you in control.

FIQ Freedom is the **turnkey breakaway advisor platform** that makes the journey to independence fast and easy.

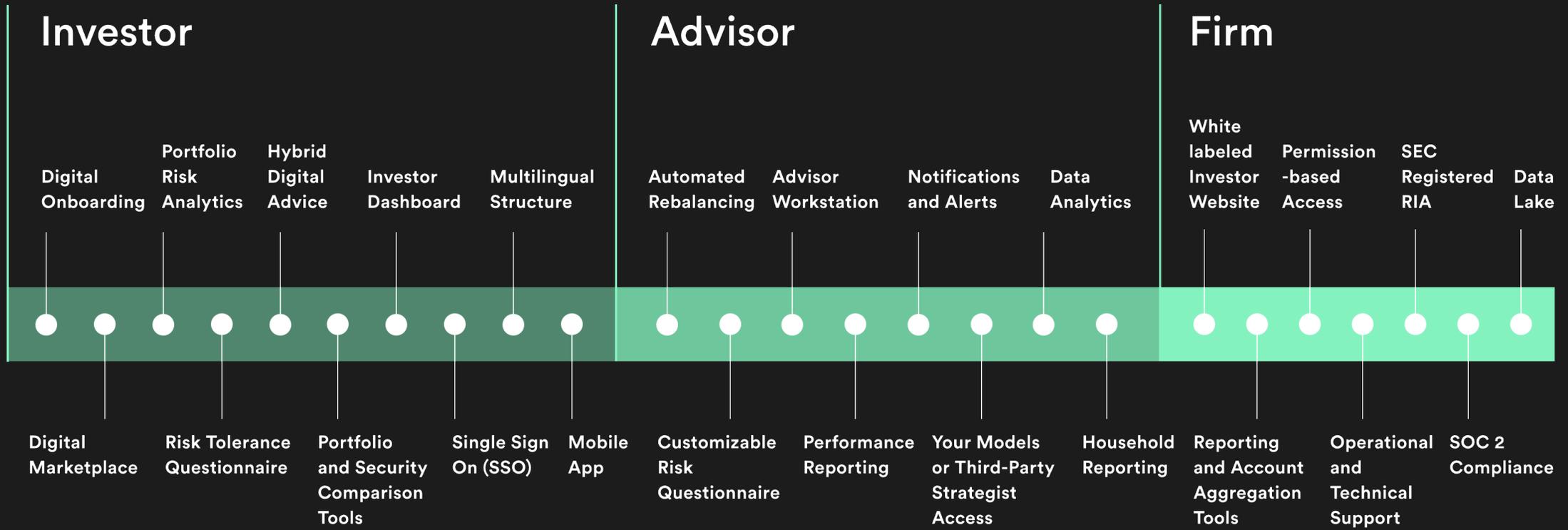
In as little as six weeks you'll get a white label wealth management platform that delivers the **modern advisor and client experience, advanced portfolio management tools, and workflow and process automations** transitioning advisors need to scale for success.



**FIQ Freedom**



# FIQ Freedom





**Bridge the gap between wealth management and payments with the digital investment services wallet users want and the revenue channels wallet companies need for growth.**

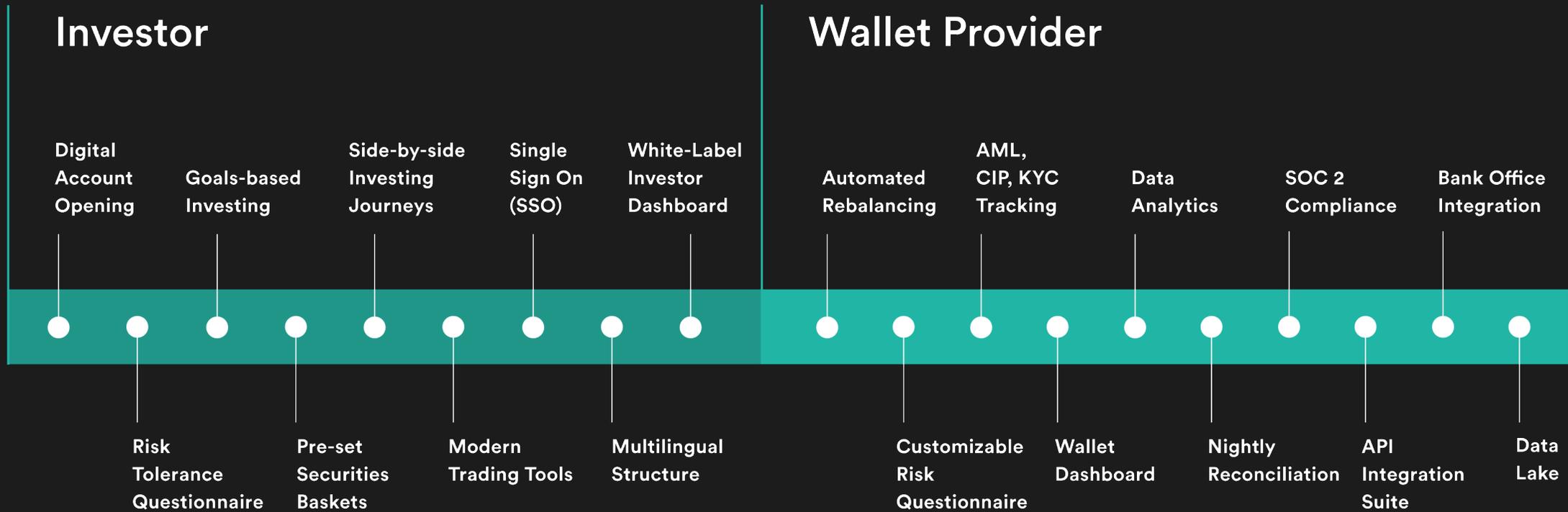
Seamlessly integrating sophisticated wealth management capabilities including goals-based digital advice and self-directed investing directly into their existing platforms, **FIQ Wallet** gives wallet providers new revenue streams and enhanced value to their users, building stickiness into the wallet and increasing market adoption.

**FIQ Wallet**





## FIQ Wallet



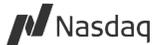


# FIQ leadership team brings an unparalleled depth and breadth of experience in financial services



**Eric Noll**

Chief Executive Officer  
30+ Years Experience



**Jim Cott**

Chief Financial Officer  
25+ Years Experience



**John Kimbro**

Chief Technology Officer  
34+ Years Experience



**John Guthery**

Chief Investment Officer  
27+ Years Experience



**Peter Brittain**

Head of Business Development  
7+ Years Experience



**Sean Ristau**

EVP Business Development  
23+ Years Experience





# We Partner with Global Technology Leaders



Google Workspace

DocuSign®

 Jira Software



 twilio



QUODD

 secureframe



# FusionIQ integrates with many of the largest and most trusted custodians

APEX Clearing™



DRIVE WEALTH



anchorage  
digital

InteractiveBrokers



BNY MELLON

PERSHING



# We Deliver Digital Wealth.

**5 Minutes**

to Onboard a New  
or Existing Client

**6 Weeks**

to Implement a  
White Label Platform

**115,000+**

**Investors**

on FusionIQ One



# An award-winning platform

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Best Wealth Management  
Solution by a Vendor  
Global BankTech  
Awards 2024

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Finalist 2024  
WealthManagement.com  
'Wealthies' Awards

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Best as-a-Service  
Solution for Wealth  
Management Banking  
Tech Awards USA 2024

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Double Finalist 2024  
ThinkAdvisor LUMINARIES  
Awards

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Excellence Awardee  
WealthTech Provider of  
the Year InvestmentNews  
Awards 2024

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Finalist 2024 Credit  
Union Times  
LUMINARIES Awards

# Digital Wealth. Delivered.

Peter Brittain  
Head of Business Development

908.418.3428  
pbrittain@fusioniq.io

