

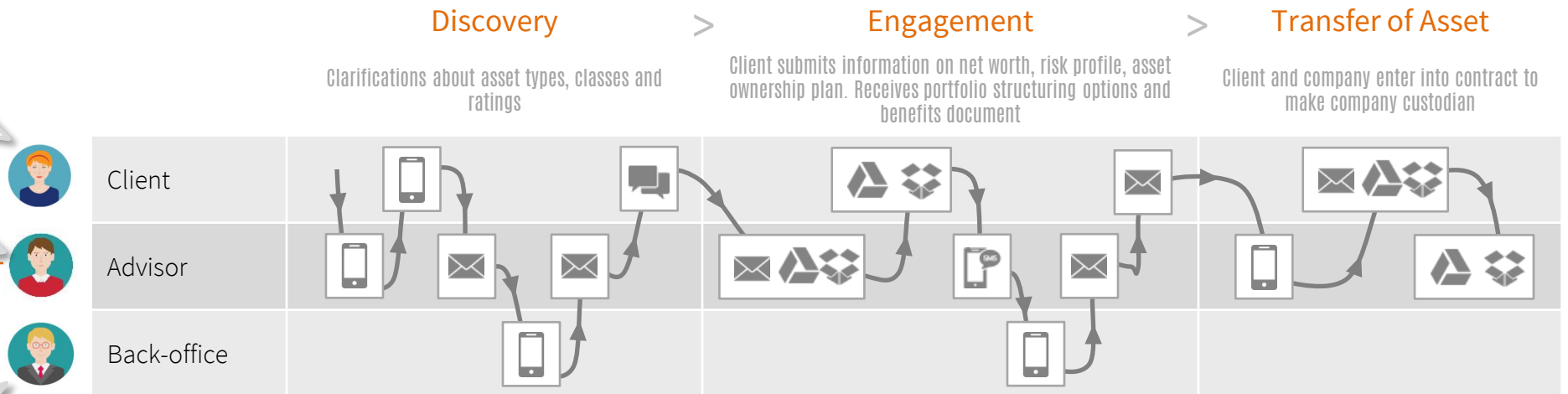
Eugene Grey, Financial Advisor



“Wish it was easier to engage my clients.”

ASSET ACQUISITION TODAY

- This is too cumbersome!
- Oh, I can't find where I put the form
- Where do I find the trail of conversations & files?

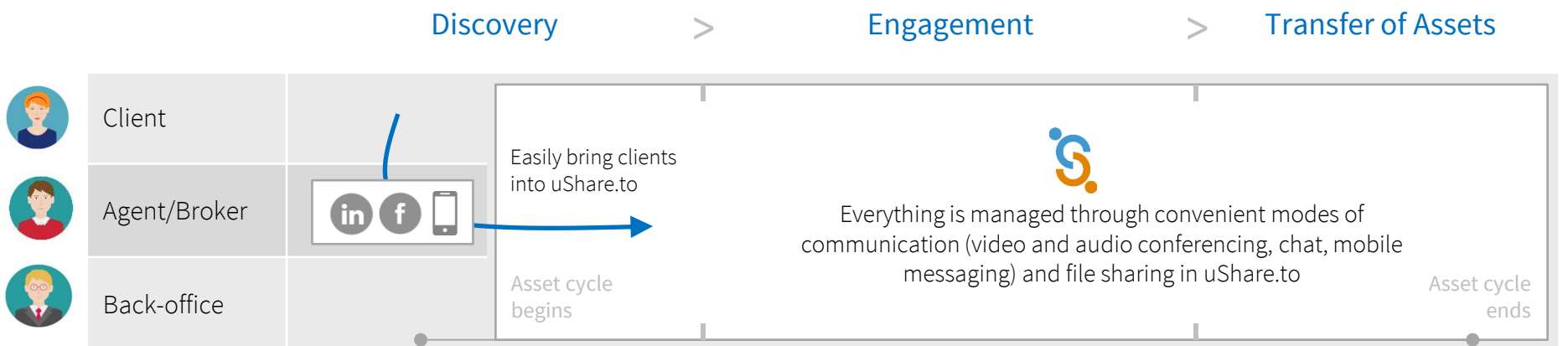


THE OUTCOME

Information passes through as many as 7 tools

- LACK OF TRANSPARENCY
- DISENGAGED CLIENTS
- LONGER CYCLES
- REGULATORY ISSUES

ASSET ACQUISITION WITH uShare.to



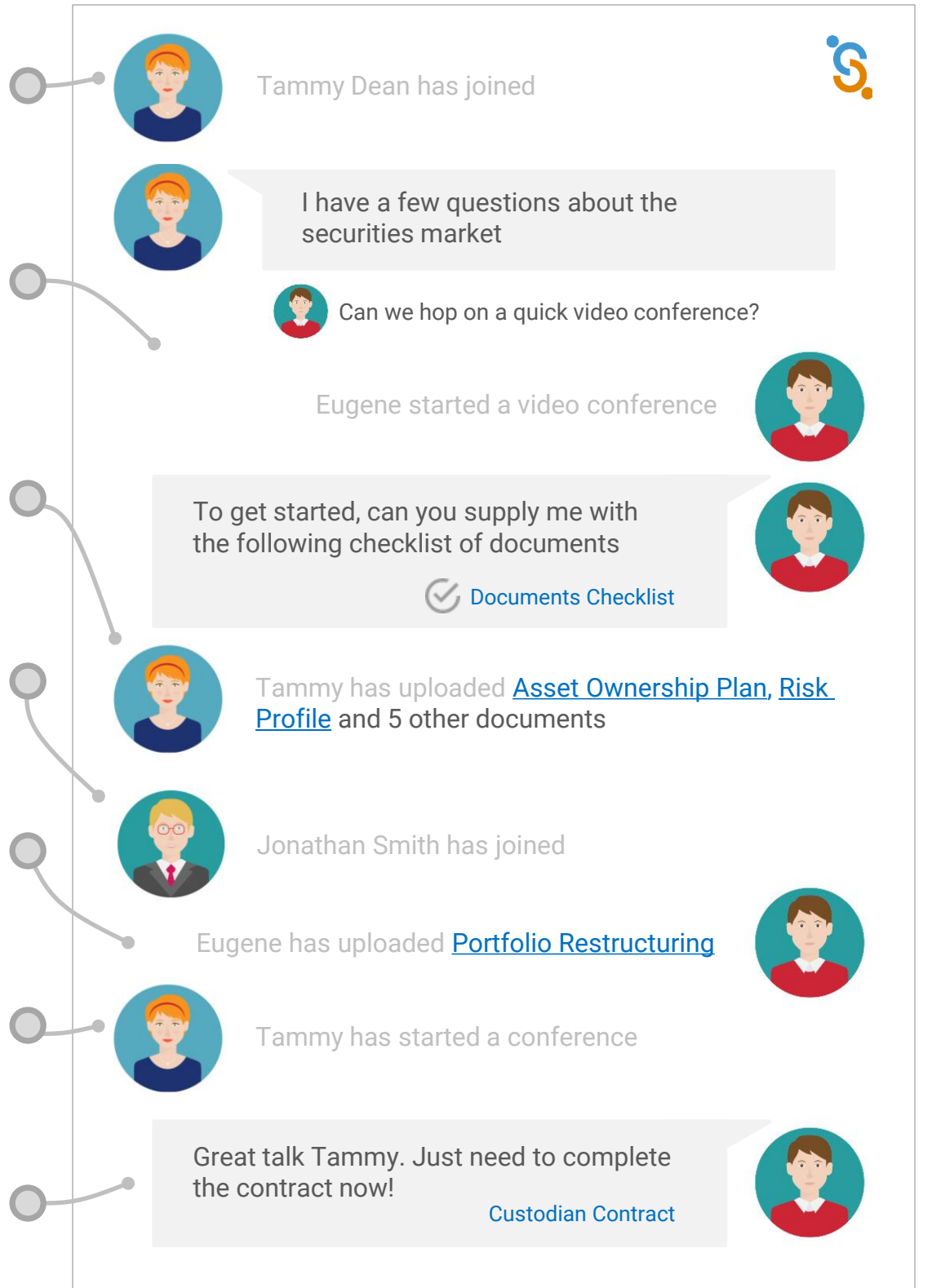
THE OUTCOME

Single place to interface with client & record info

- MOBILITY
- TRANSPARENCY
- ENGAGEMENT
- CENTRALIZED RECORDS FOR COMPLIANCE

Asset Acquisition enabled by uShare.to

- Financial Advisor invites clients into "Share"
- Advisor gives answers about imminent market & industry impacts using preferred communication channels
Mobile chat, video/audio conf, web chat
- Advisor asks client to provide checklist of documents about net worth, risk profile, asset ownership plan etc.
- Advisor invites back-office audit team member to go through documentation
- Based on Client's requirements Advisor submits portfolio structuring options and benefits document
- Client and Advisor go over documents together for final clarifications
- Advisor submits contract for appointment of his firm as custodian of client's assets



Benefits for advisor

- Engage clients however they prefer
- Manage information centrally
- Be mobile
- Shorten acquisition cycles



Benefits for client

- Get a transparent view of the entire acquisition process
- A single place to get all answers
- Simplify information sharing



Benefits for financial firm

- Data security and integrity
- Auditability through archived communication and documentation*

* Conference recording coming soon in Q1 2016



Any device

A first look at uShare.to

Manage entire asset acquisition cycle in one place

The screenshot displays the uShare.to interface. On the left is a dark sidebar with navigation options: 'MY STUFF', 'Search', 'Integrations', '+ Add New Integration', 'SHARES', and 'CHAT'. The main area features a video conference with two participants: a woman with glasses and a man with glasses. Below the video is a chat window with messages from Linda Powers and Jon Spears. A 'Share Screen' button is visible above the chat. On the right side, there are controls for 'Stop Camera' and 'Leave Conference', along with a 'Schedule Meeting' button and a list of 'PEOPLE IN THIS SHARE'.

One stop for sharing information

One stop for all your conversations

Communicate with the most convenient means

Involve anyone – underwriters, brokers, backoffice – as you go.

www.uShare.to