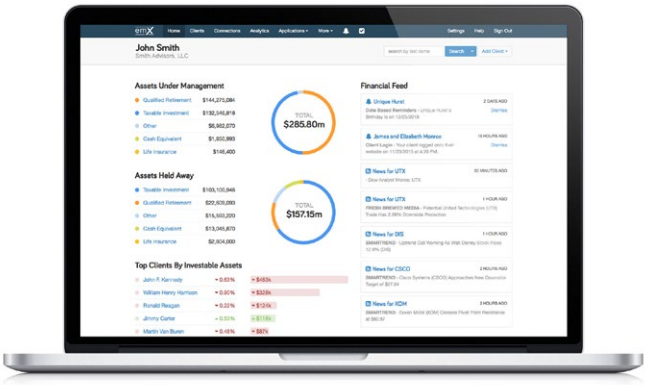
emX Select Slick: Product Overview

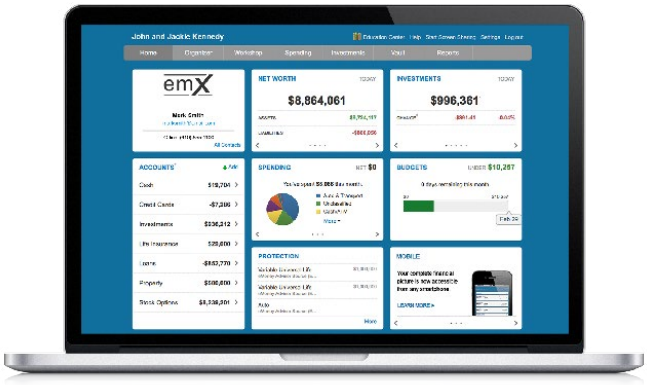
The Tools You Need. None That You Don't.

The emX Select Platform is your bridge between improving business efficiency and enhancing your client experience. Spend less time entering data, and more time focusing on your client relationships with emX Select.



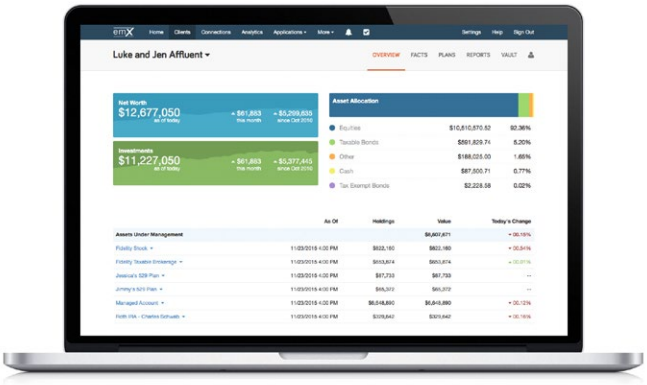
Advisor Dashboard

- View and manage your entire book of business within one single, secure tool.
- **Screen Sharing** lets you meet virtually with your clients.



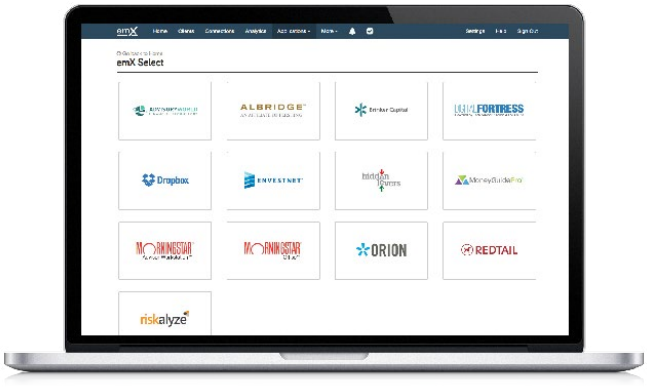
Client Portal

- **Data Gathering** and **Budgeting** tools keep your clients' entire financial picture in one place.
- Our advisor-branded **Mobile App** offers clients full functionality of their portal.



Account Aggregation

- Advisor connections link the **accounts you manage** to your dashboard.
- Client connections pull in **held-away assets** for a holistic view of your clients' finances.



Integrations

- Simplify your day-to-day process and sync the industry's best applications, including performance reporting software, client relationship management, investment research and more.

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