

Go Mobile

to Enhance the Client Experience



Your client base is changing. To keep up, you'll need to deliver a digital experience that keeps them happy.

Changing Clientele



01 ARE WILLING TO VIRTUALLY MEET WITH A FINANCIAL PROFESSIONAL



02 WOULD SEEK FINANCIAL EDUCATION ONLINE



03 WANT ACCESS TO THEIR FINANCIAL PLANNER ANYTIME, ANYWHERE



04 DESIRE A SIMPLER AND MORE EFFICIENT FINANCIAL PLANNING EXPERIENCE

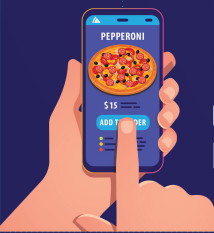


Wanted: A Mobile Online Experience



USERS SPEND AN AVERAGE OF **5 HOURS** ON MOBILE DEVICES EACH DAY

MILLENNIALS ACCOUNT FOR **43%** OF ALL MOBILE FINANCIAL USAGE



52% OF ALL WEBSITE BROWSING HAPPENS ON MOBILE DEVICES



40%

LOADING



OF CUSTOMERS LEAVE A WEBSITE THAT TAKES MORE THAN 3 SECONDS TO LOAD ON MOBILE



YOUR OPPORTUNITIES

1. INCREASE ONLINE PROSPECTING → GAIN NEW CLIENTS
2. IMPROVE MOBILE CLIENT INTERACTION → RETAIN MORE CLIENTS
3. DEVELOP MOBILE-FRIENDLY PROCESSES → STRENGTHEN YOUR CLIENT EXPERIENCE