



Unitifi[®]

Financial Behavior Defined

Unitifi: FinTech Software

We Unite

Client's Risk Personality & Behavior

~ **Driving Decisions**

to

Financial Industry Experts

~ **Driving Relationships**

Assessment Assisted

~ **Behavior Based Advising**

Is the Key to Success



Unitifi: FinTech Software

Our Relationship Advising Tools Help Firms & Professionals

- **Reduce Client Litigation Expenses**
- **Decrease E&O Premiums up to 30%**
- **Reduce Marketing Spend**
- **Maintain Proof of Compliance**
- **Predict Allocation Needs**
- **Increase AUM**
- **Increase Proper Referrals**
- **Decrease Orphan Clients**
- **Manage FinPros More Effectively**
- **Predict FinPro Hiring Needs More Accurately**
- **Onboard New Clients More Efficiently**
- **Retain Clients More Effectively**



Using Science to Connect



Research & Development Theories applied from Richard Thaler, Daniel Kahneman, Robert Shiller & many others...

Sought **Guidance** 250+ CFP®s & CFA®s across the US.

Assessment & Analytics

Edan Jorgensen, PhD
David Volkman, PhD
Stacia Jorgensen, MA

Conferences Attended & Presented For Scientific Review



October 17-20, 2018
DePaul University
Chicago, IL, USA

Using Science to Unite

- **Assessment Assisted**
 - **Short 2-7 Minute Client Assessment**
 - **Results Immediate with Over 99% Proven Accuracy**
- **Science Based and Proven**
- **Compliance Approved and Partnered**
 - **RIA Compliance Consultants Affiliated**
- **Insurance E&O Vetted and Accepted for up to 30% Savings**
 - **Lockton Affinity/Lloyd's of London**
- **Guidance Provided for FinPro~Client Communication**
- **Direction Given for Assisting Decisions & Relationships**
- **Results Mapped for Easy Visual Ques**



Next Steps

