

# FusionIQ One

**A true end-to-end digital wealth platform with the flexibility and features to grow with you.**

Integrated and intuitive, FusionIQ One is an all-in-one platform with four easy to activate modules as your needs grow and you scale.



ca.fusioniq.io

Digital Advice

Self-Directed

finTAMP

Digital Model Marketplace

## Digital Advice

Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, the FusionIQ One Digital Advice module delivers the features you need to realize your vision. From customized RTQs to powerful portfolio management tools, data aggregation and transactions, AML and KYC tracking, investor dashboard, advisor workstation, teams management and alerts, the Digital Advice module gives you the tools you need to grow.

## finTAMP

FusionIQ delivers the first true digital turnkey asset management program, integrating our all-in-one advisor platform with end-to-end digital investment management technology. finTAMP provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale, grow and improve profitability.

## Self-Directed

The FusionIQ One Self-Directed investing module integrates essential features to realize your goals, whether it's a small accounts solution, a new revenue channel, lowering infrastructure costs, faster client onboarding, or giving your full advice clients an opportunity to make some trades on their own. From AML and KYC tracking to check out cart or ticket trading, fractional or whole share trading, investor dashboard, watchlists, recurring deposits and systematic withdrawals, and a variety of account types, the Self-Directed module delivers.

## Digital Model Marketplace

The Digital Model Marketplace makes it fast and easy for advisors and firms to create personalized portfolio solutions at scale. Whether you choose models created by leading strategists, build your own, or use a combination of both, you're in control of winning investment strategies at a lower cost. And it gives you a digital channel to distribute your own custom models.

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## We Think Bigger

Many talk about an end-to-end digital wealth management platform. We deliver. FusionIQ One delivers an unmatched breadth and depth of benefits and features.

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## Empowering You to Do Great Things

FusionIQ One delivers the profitable digital workflows and process automations financial advisors and institutions need to scale their operations for growth.

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## Happy Clients. And Advisors.

FusionIQ One delivers an intuitive hybrid investing platform that empowers both clients and advisors. And it gives them attractive dashboards.

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## Zero to Digital

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

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## White Labeled so Your Brand Stands Out

Giving your clients new ways to invest with you, and a digital experience that is intuitive and enjoyable, on the device of their choice, your brand stands out.

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## A Tech Stack that Works for You

FusionIQ One with single sign on (SSO) lets you simplify your tech stack to realize greater efficiencies and achieve higher productivity.

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## Multi-Custodian Platform

FusionIQ integrates with many of the largest and most trusted custodians to minimize conversion risk.

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## API Integration Suite

FusionIQ One offers an API suite to help with integrations so you can get even more out of your digital platform.

# Scale your growth with FusionIQ One.

[Book a Demo Today](#)

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