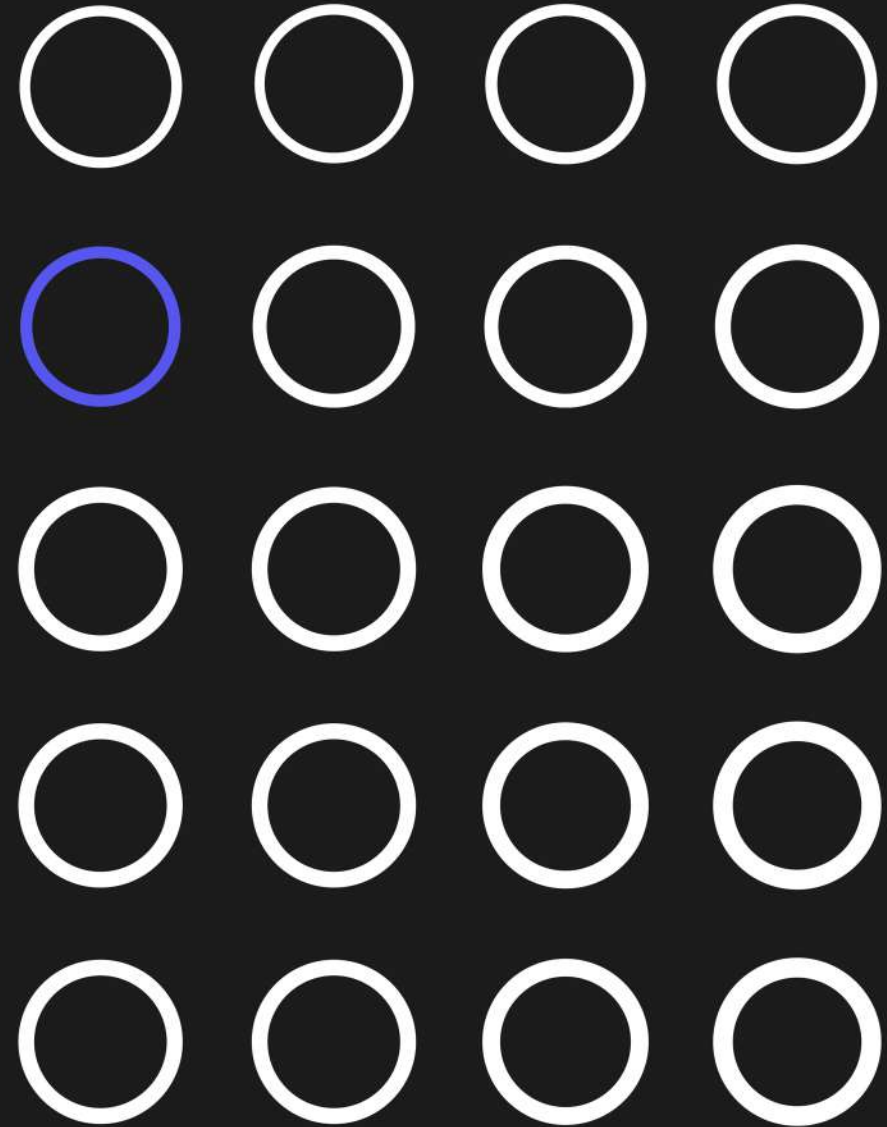




FusionIQ Canada Overview March 2024

We make it easy for financial advisors and institutions to be digital wealth leaders.

Give your clients and advisors the digital experience they want. Get the workflows and process automations you need to grow at scale.





Become the Disruptor.



Hybrid Digital Advice	Self-Directed	finTAMP	Digital Marketplace
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FusionIQ One is a true end-to-end, digital wealth management platform with four seamlessly integrated modules that deliver an unmatched breadth and depth of benefits and features.



You Win the Digital Game with FusionIQ One.

Workflows. That. Actually. Work.

True end-to-end workflows means you can profitably scale your growth, seamlessly integrating new revenue streams.

Pay as You Grow

Integrated modules means you pay for what you need, when you need it.

Say Goodbye to Legacy Systems

Our all-in-one platform let's you say goodbye to legacy software in your tech stack, reducing costs while increasing efficiencies.

Zero to Digital

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

No Long-Term Custodian Contracts

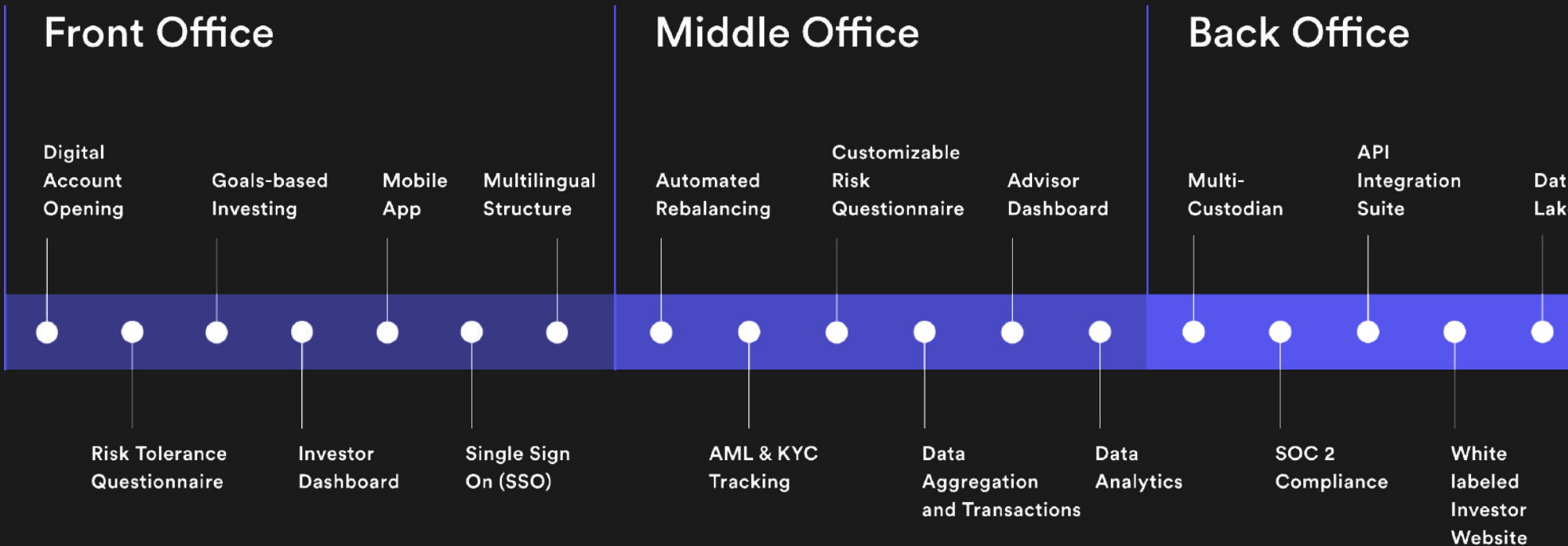
Our multi-custodian platform gives you exposure to a wide range of custody options at attractive pricing.

Onboard. Fast.

Onboard clients in as little as five minutes on many of the most trusted custodians.

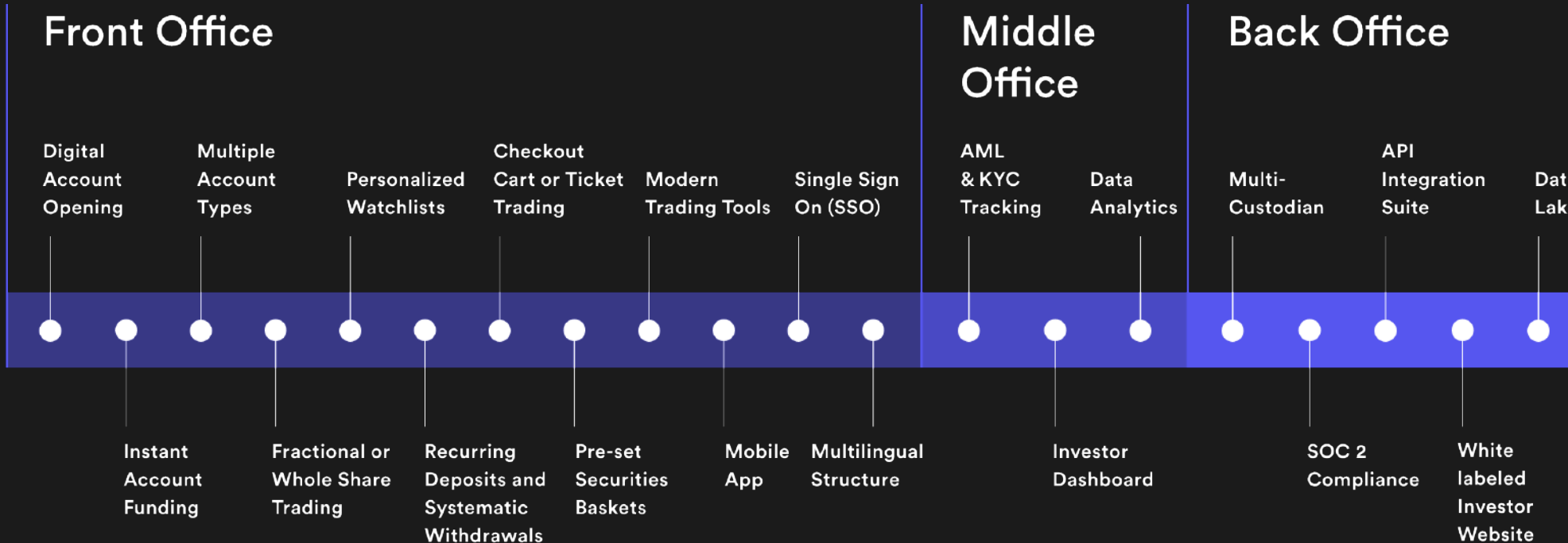


Hybrid Digital Advice Module



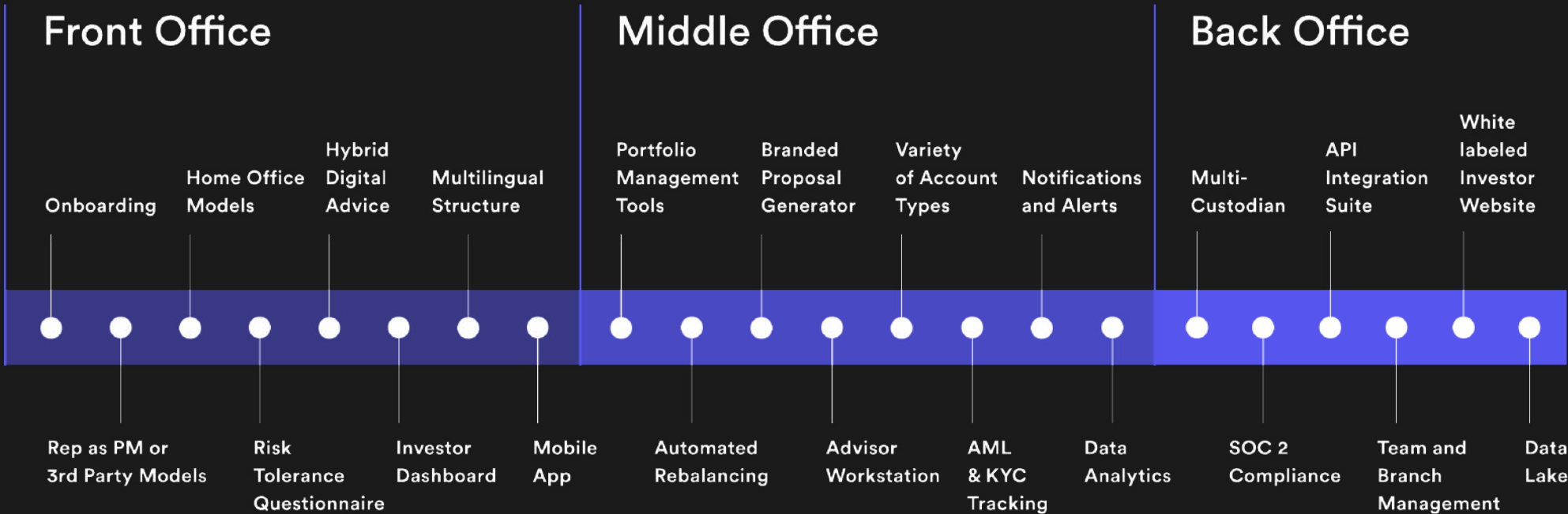


Self-Directed Module



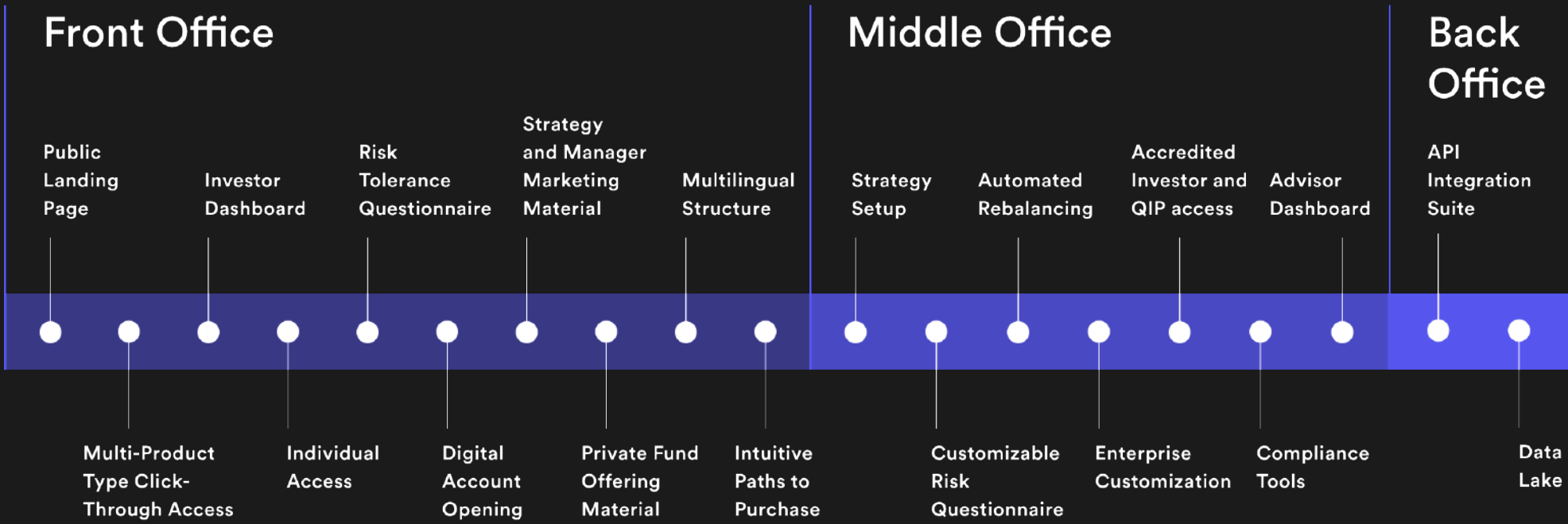


finTAMP Module





Digital Marketplace Module





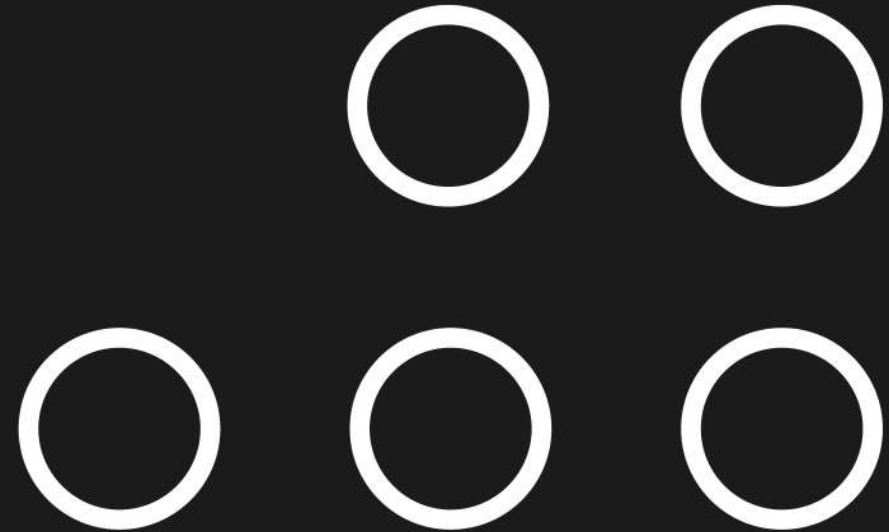
Scalable Products for Profitable Growth



 fusionIQ
Journey

 fusionIQ
TAMP+

 fusionIQ
Market One

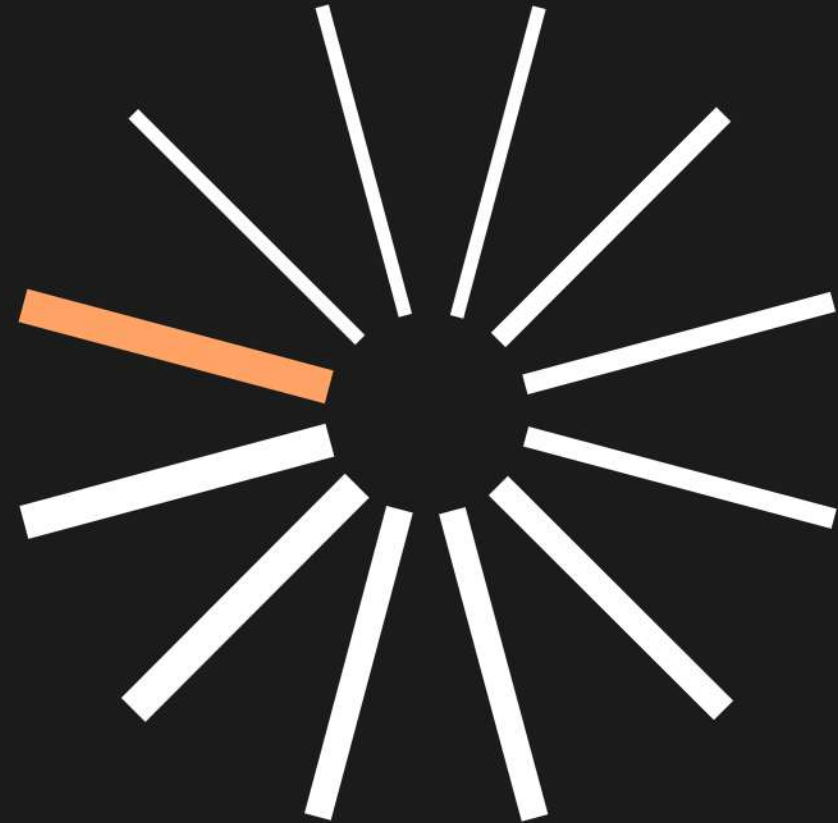




The digital experience
your clients and advisors
want. **The investing
services you need.**

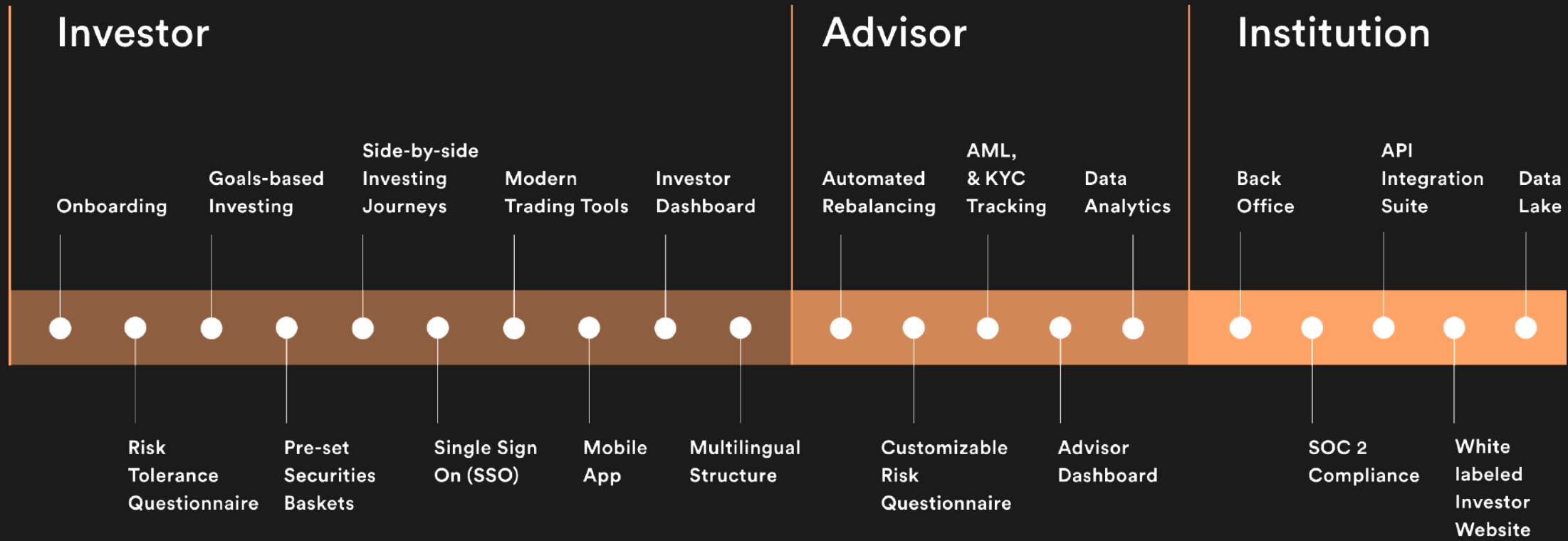
Whether your goal is democratization of the investing process, a small accounts solution, a new revenue channel, lowering infrastructure costs, or faster client onboarding, **FIQ Journey will have you achieving your goals in as little as six weeks.**

FIQ Journey





FIQ Journey

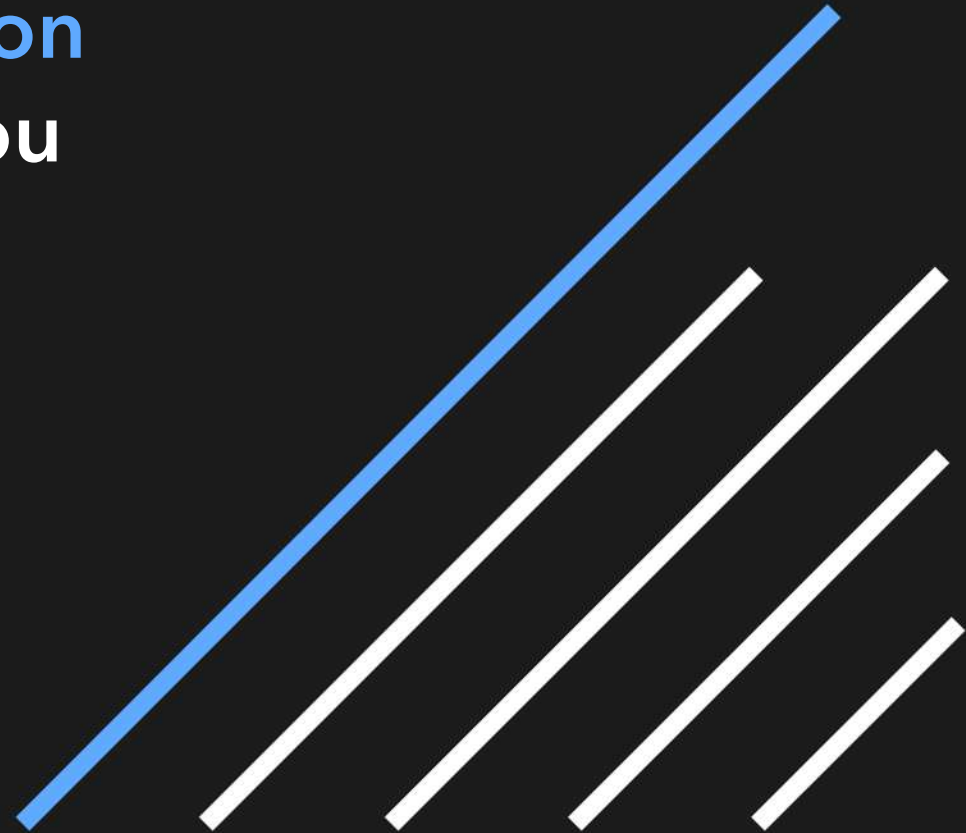




Get the **portfolio diversification** investors need at the scale you want to grow.

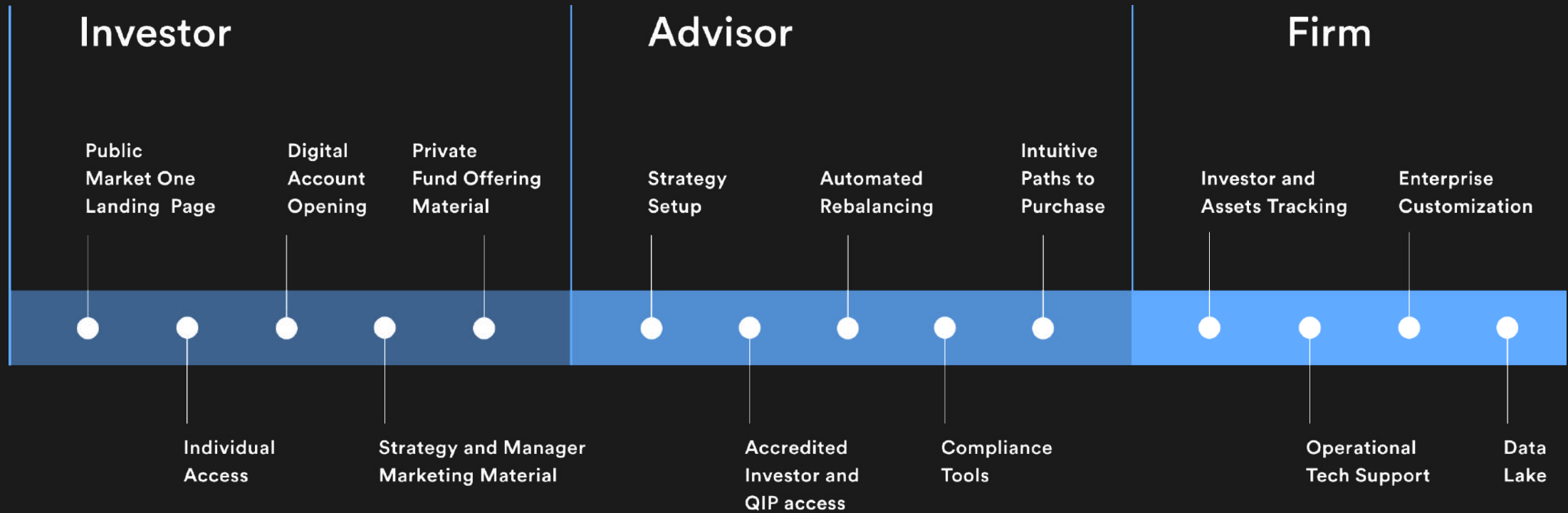
Digitally onboard to a **single market** to find and invest in **digital assets, SPV and alternative funds, private investments and ETFs** at a lower cost. Create unified advisor and client portals and produce personalized portfolios at scale. And asset managers have a digital channel to distribute their products.

FIQ Market One





FIQ Market One





Get the easy on-ramp to
greater efficiency and higher
productivity at a lower cost
than a conventional TAMP.

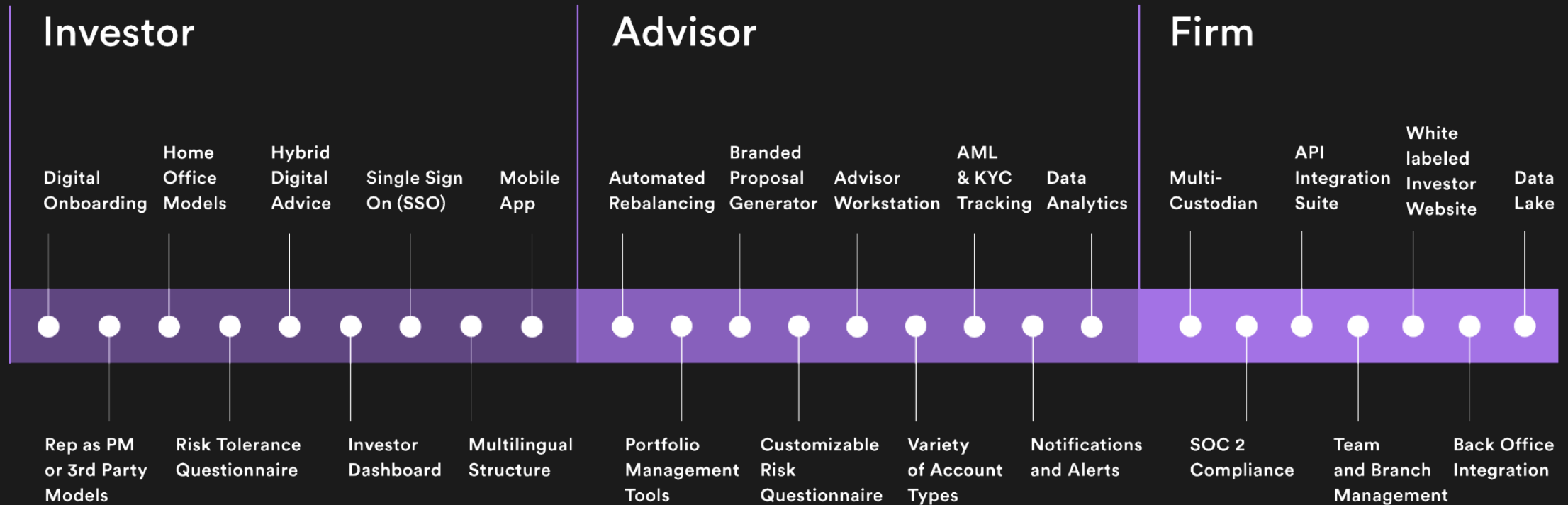
FIQ TAMP+ is the first true digital TAMP, integrating our end-to-end wealth management platform with advanced portfolio management technology. FIQ TAMP+ provides the modern advisor and client experience, platform flexibility, and efficiency that enables firms to scale for profitable organic growth.

FIQ TAMP+





FIQ TAMP+





FIQ leadership team brings an unparalleled depth and breadth of experience in financial services.



Mark Healy

Chief Executive Officer
34+ Years Experience



Jim Cott

Chief Financial Officer
25+ Years Experience



John Kimbro

Chief Technology Officer
34+ Years Experience



John Guthery

Chief Investment Officer
27+ Years Experience



Howard Atkinson

Head of Business Development
35+ Years Experience





We Partner with Global Technology Leaders



Google Workspace

DocuSign®

 Jira Software



 twilio



QUODD

 secureframe



FusionIQ integrates with many of the largest and most trusted custodians.

APEX|Clearing™



DRIVEWEALTH



anchorage
digital

 InteractiveBrokers



BNY MELLON | PERSHING



We Deliver Digital Wealth.

5 Minutes

to Onboard a New
or Existing Client

6 Weeks

to Implement a
White Label Platform

115,000+

Investors

on FusionIQ One



An award-winning platform.

Finalist Banking Tech Awards USA 2024 Best as-a-Service Solution for Wealth Management

Double Nominee Fintech/TAMP Platforms 2023 ThinkAdvisor LUMINARIES Awards

Highly Commended 2023 Fintech Futures Banking Tech Awards Best Digital Solution Provider

Asset Manager Platform of the Year 2022 Wealth Solutions Report

Double Finalist 2023 WealthManagement.com 'Wealthies' Industry Awards

America's Best TAMPS 2021, 2022 and 2023

Digital Wealth. Delivered.

Howard Atkinson, CFA CIMA® ICD.D
Head of Business Development

416.659.5181
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