ACCELERATE YOUR PRODUCTIVITY WITH SKIENCE

Improve Efficiency with Advanced Digital Onboarding Featuring Household-Level Multi-Account Opening

An enhanced UI, functionality that enables advisors to open multiple financial accounts simultaneously, and a deeper, bi-directional integration with Envestnet, provides an efficient, multi-point new account opening experience for advisors.

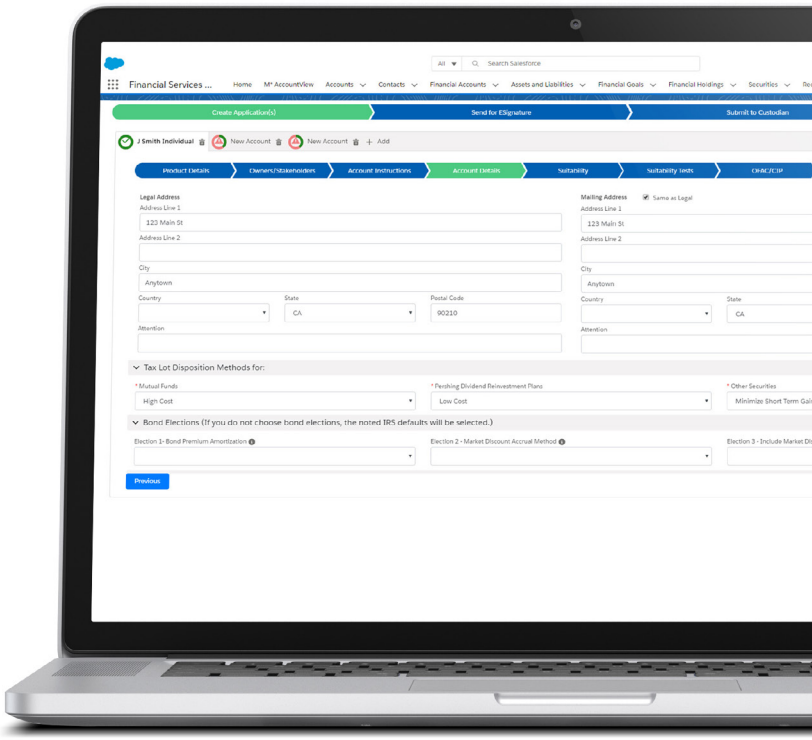
Skience 12.0 is designed to improve advisor productivity, reduce data entry efforts, increase accuracy and facilitate a better investor experience.

New functionality enables advisors to open multiple new accounts for households and deliver all required forms to their clients in one electronic signature experience. This enhanced workflow essentially digitizes real-life wealth management interactions, streamlining the process for all involved, and greatly simplifying the client experience by reducing the steps and the time needed to open multiple new accounts.

Skience 12.0 also offers bi-directional integration with the Envestnet Platform, minimizing the rekeying of information and expediting the delivery of documents to the client for electronic signature.

Key Features:

- **Multi-Account Opening for All Major Custodians:** Open multiple accounts at once with increased speed and accuracy using robust guided workflows for Fidelity Custody, E*Trade, Schwab, TD Ameritrade, Pershing Advisor Solutions, and Pershing Clearing.
- **Enhanced Envestnet Integration:** Launch new account opening within the CRM, pre-fill information into the new account wizard from Envestnet, and auto sync the proposal documents with a single click.
- **Enhanced Integration with Fidelity:** Experience a more complete information-gathering experience within Skience reducing errors and eliminating the need for dual data entry.
- **Improved Data Aggregation:** Access all of the data elements received from a data feed for a 360° view of your clients' financial accounts.
- **Annual Review:** Conduct a more productive annual review meeting with investors with our enhanced tear sheet functionality.



Privately-held and headquartered in Virginia, Skience delivers innovative digital strategies and solutions that transform businesses. Skience offers advisory and CRM implementation services within the Salesforce ecosystem, as well as an industry-leading Salesforce-native digital platform for broker-dealers and RIAs that provides wealth managers an efficient way to unify their technology, increase back-office and advisor productivity, and set the stage for a great client experience.

Visit **Skience.com** to learn more.

Or contact us at **(866) 754-3623** or **info@skience.com**

to explore how Skience can transform your business.

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