NEPSIS®

Advising With Clarity®

Why Advisors are Making the Clarity Move to Nepsis®

We embrace our advisors' independence and entrepreneurial spirit so they can find success. We are passionate about our Clarity Message and vision of changing the investment world one investor at a time through the power of clarity. That's why we focus on providing advisors with the processes, tools and resources to be successful.

We know accomplishing our goal will require fortifying our growing team with new advisors that share our belief and passion. Our advisors are empowered to reach their goals by having the time to focus on what they do best — building relationships. No cookie-cutter solutions, products to push or quotas to fill — you get the tools, tech and support you need to create meaningful impact in the lives of your clients and find success for your own.

Looking for a better home for your business? You just may be one of us. Find Advising With Clarity®.

Money Management

Invest With Clarity®. Investors should know what they own and why they own it in their portfolio. By putting Process before Progress®, we empower investors with greater confidence and conviction in their chosen investment strategies. Better client satisfaction for you.

- **Separately Managed Account Platform**
- **Active Portfolio Management**
- **Private Money Management**
- **Investment Policy Statement**
- **Ongoing Client Communication**
- **In-house Investment Management Research**

Financial Planning

The Clarity Roadmap® Proprietary Planning Process keeps your clients' planning needs on the fast track. Fully integrated across Salesforce, the Clarity Roadmap® provides the framework and throughput, so you efficiently provide deep planning guidance.

- **Easy Onboarding + Enhanced Client Experience**
- **Actively Track Milestones + Updates**
- **Retirement Policy Statement**
- **Ongoing Reviews + Milestones**
- **Estate + Legacy Planning**
- **Charitable Giving + Tax Strategies**

Technology + Back-Office Support

Access a mature infrastructure and technology ecosystem. Our top-tier technology is complemented by our experienced back-office, compliance and operations teams.

- **Integration with Salesforce®, Clarity Roadmap®, NetDocs, Pershing, Act-On, and others**
- **Compliance Supervision + Review Process**
- **Ongoing Advisor Education**
- **Back-Office Prepares All Paperwork Needs**
- **Access to Support Desk + Team of Financial Professionals**

Client + Prospect Marketing

Leverage a robust marketing platform that's integrated with Salesforce, as well as other powerful online tools. You gain insight on historical data, and reports to best address your clients' and prospects' interests.

- **Monthly Podcast Show**
- **Monthly Investor Thought Pieces**
- **Quarterly Report Updates + Videos**
- **Automated Planning + Money Management Tools**
- **Lead Generation Campaigns**

We are dedicated to helping you to find clarity in your advising and set you on a path to accomplish your life's ambitions. We invite you to join us.

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