CG
Advisor
Network

Customization.
Control.
Freedom.

Enabling financial advisors to spend more time with their clients by providing a high-powered investment management platform.

www.cgadvisornetwork.com

On Average, Advisors Spend 40% of Their Time on Asset Management

But for advisors who want to grow and scale their businesses, their time is better spent focused on building and deepening client relationships. According to Invesco research, to inspire referrals from clients, advisors need to have 12 meaningful interactions with them per year – which is difficult to achieve for advisors who spend almost half their time building portfolios.

The solution to spending less time on investment management and more time with clients is a sustainable, repeatable process that enables scalability and operational efficiency. CG Advisor Network has the platform and technology solutions to help advisors do just that. By leveraging our back-office and investment management support and services, you can control, customize and streamline operations related to:

- Account opening & digital onboarding
- Trading & rebalancing
- Security selection
- Documentation & reporting

And much more--all while maintaining your complete independence.

THE CGAN INVESTMENT MANAGEMENT PLATFORM:

Alleviating Operational Burdens for Independent Advisors

Leverage private client investment strategies and solutions based on the unique needs and goals of your clients and your business.

THE POWER OF OUTSOURCING

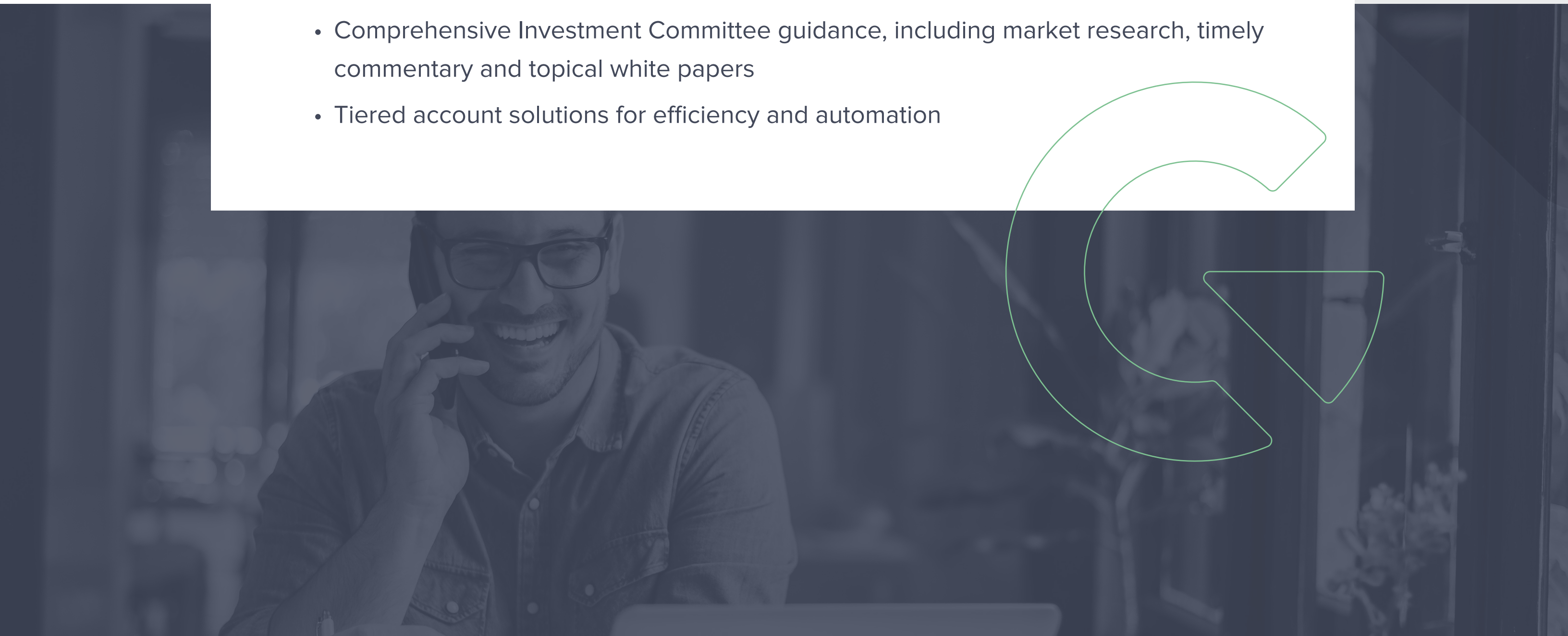
- High-net-worth client strategies utilizing Unified Managed Householding with tax-intelligent implementation
- Top-down strategic allocations with the flexibility to employ third-party managed models
- Risk-based asset allocation portfolios, income-focused solutions and cost-effective ETF portfolios
- Carefully curated fintech partnerships to help fast-track the outsourcing process

ADVISOR-MANAGED INVESTMENT PORTFOLIOS

- Driven by your investment philosophy
- Discretionary managed models with sleeve-level trading
- Support maintaining and trading existing models
- Open-architecture investment platform
- Risk tolerance and behavioral assessment tools

WIDER INVESTMENT SPECTRUM & PROVEN EXPERTISE

- Multi-custodial capabilities to support the entire portfolio construction process
- Alternative investment offerings, including institutional private equity and hedge fund strategies
- Comprehensive Investment Committee guidance, including market research, timely commentary and topical white papers
- Tiered account solutions for efficiency and automation



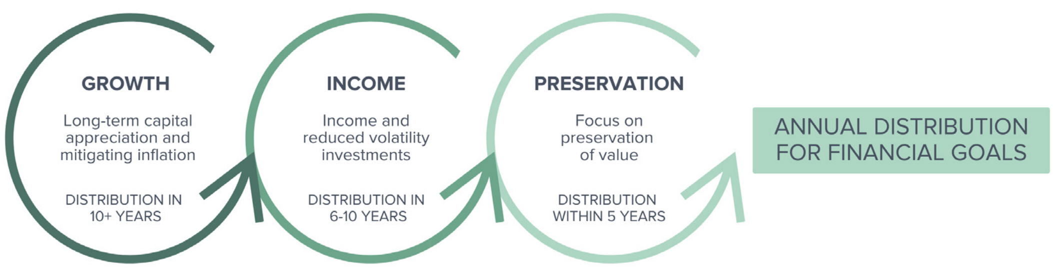
Our Life-Centric Investment Approach

It's the Ultimate Goal: How can you provide your clients with better investment outcomes and a more comfortable financial journey, while you gain back the time needed to deepen relationships and drive business growth?

Aligning Financial Goals with Life Goals

Our three-phase approach can help keep clients more committed to their strategy in both up and down markets, with the potential to yield better investment outcomes than taking distributions from standard 60/40 portfolio.

Assets that have an expected need within 5 years can be invested into a portfolio designed to protect against volatility, while assets expected to be spent in 6-10 years can weather some volatility as long as the middle-term investments are kept in check. With 10 years' worth of expected needs placed, remaining assets could be suitable for a long-term equity allocation.



Simplified Process for Better Investment Outcomes

With our platform and investment approach, we make it easy to build and execute personalized portfolios for multiple clients from a single-point solution. This simplicity and scalability can improve your practice economics, and you'll have access to an experienced team to help monitor your portfolios in real-time with a dedicated focus on risk management and investment discipline.

The Advantage of Flexible Portfolio Construction

INDEPENDENT PORTFOLIO MANAGEMENT

With access to our investment consulting team and third-party research for guidance, you can outsource as much or as little of the portfolio construction process as you like while retaining full independence without sacrificing customization, scale or control.

OPEN ARCHITECTURE FOR SCALABLE CUSTOMIZATION

Leverage our powerful tech platform and open architecture solutions to build customized client portfolios in an efficient, effective and scalable way, including UMA, SMA, asset allocation models mutual fund/ETF strategies, third-party managers, individual equity, and fixed income securities.

STREAMLINED, EASY-TO-USE WORKFLOWS

We can help you build and monitor portfolio construction, investment selection, trading, compliance, and other related guardrails while providing the flexibility you need by establishing efficient and simple workflows.

REAL-TIME COMMUNICATIONS WITH CLIENTS

Your white-label dashboard enables you to share portfolio status and performance in real-time with clients, and we make it easy to help you send branded mass communications when needed. By communicating actionable insights efficiently, you can make it easier to build and deliver better investment solutions for your clients.

An Investment Management Platform with a Purpose

Our primary objective, to create better client outcomes, is reinforced by the core values we follow as a dedicated investment team for our advisors:

Diligence

Treat every client dollar like it was your own

Creativity

The best solutions are rarely "in the box"

Efficiency

Work smarter, not harder

Ownership

Empowered and accountable

About CG Advisor Network

CG Advisor Network enables advisory firms to provide personalized risk-managed financial planning solutions for their clients easily and effectively, including high-net-worth client, third-party manager, UMA, SMA, ETF portfolio, institutional private equity and hedge fund strategies. Made up of experienced, certified financial professionals that are held to the fiduciary standard and backed by our comprehensive Investment Committee guidance, CG Advisor Network provides modernized business consulting and independent advisor solutions to enable greater efficiency and promote growth.

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How Can We Best Support You as an Independent Advisor?

Get in touch with our team to learn more about the CG Advisor Network and our investment management platform.

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