



# CGAN Achieve 2023

Closing Remarks by Jeff Casey





Supporting  
Operational  
Efficiency  
To Scale  
Your Growth

**Assisting To Scale Your Back Office**



# People



Your Support Team



Realignment To Be  
More Proactive In  
Meeting Your Needs



# Systems and Technology

Communities Advisor Portal –  
V2-Trade & Client Investment  
Requests



ORION – Trading,  
Billing, Portal, Planning



LPL Clientworks-  
BD/ Custody Portal



Future Roadmap  
Opportunities – Marketing,  
Integrations, etc.



# Investment Operations

## Axxcess Wealth Management

- Outsourced partner to provide a deeper bench
- Highly experienced with ORION system

## Continued Enhancement of Program Strategies

- Risk Based
- Capital Allocation
- Improved Reporting



# Practice Optimization

Using Business Intelligence To Run Your Business



Practice KPI's



Operations Dashboards



Advisor Dashboards



Management Level Dashboards





# Compliance



Through our data integrity improvement.



Better support with less manual requests for information.



# Advisor & Business Advocacy

The future of Business Intelligence and how to make sure you are seeing all the right data points to measure your business.

Assistance in making sure you have your succession plan in place.



Assistance in best practice for your data and how we support.

Best practice and support for your vendor management requirements.







**Our Commitment Is To  
Keep You and Your Firm  
Able To Focus On What  
You Do Best!**





**Please Make Sure To  
Connect With Us  
Upon Returning So  
We Can Target Your  
Specific Needs!**



*See You*



*In 2024!*

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