SOLUTION SHEET:

Investor Portal & Mobile App

UNPARALLELED USER EXPERIENCE FOR ADVISORS AND CLIENTS

With an intuitive and engaging interface, the d1g1t enterprise wealth management platform caters to all users—from novice investors to seasoned professionals. The investor portal and native mobile app (Android/iOS) empower clients to self-serve, improving their experience while reducing the operational burden on your client support team. The tools are delivered with very detailed product usage analytics that present vital information on how and when investor tools are employed. This information allows you to tailor your offering to ensure you deliver the best experience.

Immerse your clients in a modern digital experience that reinforces your brand identity and fosters deeper emotional connections. d1g1t's investor tools enhance the client experience through interactive portfolio views and advanced analytics, promoting transparency and trust.

Advanced Analytics Combined with Contextual Information
The d1g1t investor tools are feature-rich providing advanced performance, exposure, income and risk analytics, net worth tracking, look-through analysis, two-way document sharing and more. Advisors can fine tune the client experience by balancing analytics with contextual information such as digital content, research, outlooks, articles, etc., to enrich the unique needs of investors ensuring a seamless and personalized digital experience.

Key Benefits:

- Deliver the best client experience.
- Demonstrate value to your clients by delivering a personalized digital experience.
- Promote transparency and trust.
- Provide investors with real-time access to their portfolio.
- Improve communication with two-way document sharing.

Interactive Digital Experience
What sets our platform apart is its interactive nature. Unlike static or legacy portals, advisors can configure the client experience by deciding which views they want to share with clients and which ones should be retained internally.

Through the portal and mobile app, clients can:

- **Analyze investment portfolios** - holdings, allocation and performance over time. All charts are interactive, and views are updated to mirror what the advisor sees in the d1g1t advisor platform, so the advisor and client are looking at the same information. For households or families, customizable permissions ensure each member sees exactly what they should.

- **Analyze their net worth** - including personal assets (house, cars), held-away investments and liabilities thereby providing a 360 view of the client's entire net worth.

- **Review historical transactions:**
  - Buy and sells
  - Deposits & Withdrawal – to track the flow of money in and out of accounts. Clients can view quarterly projections for up to one year.
  - Income Generated – to track the dividends, interest, and other income generated by their investments.
  - Fees paid

- **Upload & Share Documents** – two way sharing of documents that can be organized into well-defined categories such as:
  - Market outlooks
  - Portfolio reports
  - Custodial statements
  - Trade confirmations
  - Agreements
  - Notices
  - Private documents (passports, wills, etc.)

- Access digital content - including hand picked articles and research reports that are tailored for each investors interest.

White Labeling Capabilities Enhance Client Engagement
Fully integrated within the d1g1t enterprise wealth management platform, the client portal and mobile app offer self-serve white labeling capabilities enabling firms to promote their own brand – color schemas, company logo, advisor photos and contact details to deliver a differentiated experience.

Easy to Deploy and Service
The platform enhances investor-advisor interactions through proactive preference management and transparent communication. Advisors can pre-configure settings and mirror the client interface, ensuring a seamless onboarding experience and ongoing support. Empowering investors, the system allows direct self-service preference updates, while simultaneously triggering automatic notifications to both advisors and clients when any changes occur, thereby maintaining robust security.

For more information on the d1g1t wealth management platform visit **www.d1g1t.com** or email us at **getintouch@d1g1t.com**.

About d1g1t

d1g1t is a leading wealth management technology company that helps RIAs, Multi-family offices, Broker Dealers, and Bank Advisor Networks transition to a digital business model. Our award-winning Enterprise Wealth Management Platform is designed to transform the patchwork of legacy systems with an integrated platform that drives scale and operational efficiencies across the organization. Powered by an institutional-grade performance and risk engine, d1g1t provides on-demand analytics consistently used across integrated workflows for reporting, billing, trading, compliance, and client engagement activities. d1g1t provides advisors and their clients with the best digital experience available in the market, enabling firms to elevate the quality of their advice and demonstrate its value to clients.

Learn more at **www.d1g1t.com.**

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