

Where **meaningful advice** and **powerful technology** converge

Agora Dealer Services Corp. is a leading-edge Fund Management and Workflow Platform that is setting a new standard in the independent advice channel. Agora was inspired by a seasoned team of industry experts, who have been in the trenches with Advisors, Dealers and intermediaries and have a deep understanding of the current landscape and challenges faced in effectively managing and serving the needs of clients.

Agora's platform is designed to seamlessly **automate day-to-day administrative tasks** with the latest investment solutions including **low cost and zero cost nominee** and **fee-for-service account options** supported by **powerful technology, automated portfolio rebalancing tools** and **experienced, responsive customer support**.

This wealth of new capabilities frees up significant time spent on paperwork and managing increasing regulatory requirements while helping reverse the pressure of squeezed margins. Agora's goal is to help independent Advisors compete effectively and thrive amongst large financial institutions and robo-advisors. We are empowering you to deliver the advice and investment solutions that Canadian investors want and need.

Aclear.

| NOMINEE AND FEE-FOR-SERVICE ACCOUNTS

- Nominee custody service
- Fee-for-service options
- Electronic trade execution / settlement
- Low fee and no-fee options
- High Net Worth experience for all clients regardless of holdings

Afolio.

| MODEL PORTFOLIOS

- No referral arrangements
- Ready-to-Go model portfolios
- Customized, private label model portfolios
- Automated re-balancing
- Tiered and household pricing
- On-going technology credits

Agateway.

| END-TO-END DIGITAL CLIENT ONBOARDING AND MANAGEMENT

- Control pace and strategic direction of your value proposition
- Master database
- Data security layer
- Cloud-based single sign-on
- Auto-populated forms
- Auto-assembled documents
- eSignatures
- Integrated planning and reporting tools

Adock.

| INTEGRATED DASHBOARD AND API INTERFACE

- A breakthrough application interface
- Customizable dashboard
- Instant access and integration with your book of record data, services, portals and applications

▀ EMBRACE YOUR INDEPENDENCE

SCALE YOUR BUSINESS

Streamline your practice and operate anywhere, anytime from any device.

Robo firms utilized technology in an attempt to cut Advisors out of the investment advice process. Agora embraces technology to augment Advisor value and efficiency. Our powerful technology provides end-to-end processing - from client onboarding to automated portfolio rebalancing. Flexible, open architecture offers custom branded solutions for Dealers with complete control over features, functionality and future requirements helping Advisors be hyper-efficient so they can focus on serving clients and scaling their practice.

Build stronger relationships with a progressive fee structure to compete effectively and add more value.

As a carrying dealer, Agora's fee structure lets you deliver low cost and zero fee nominee and fee-for-service account options. You can consolidate multiple client name accounts into one nominee account and household accounts for better pricing. We've also eliminated transfer out fees to remove risk for clients while creating another point of differentiation from competitors.

▀ FREE UP TIME

DELIVER MORE VALUE

Enhance value for clients with an innovative asset management platform incorporating model portfolios and customizable fee-for-service accounts.

A robust suite of model portfolios* are supported by powerful portfolio monitoring, reporting and automated rebalancing tools creating efficient and effective portfolio management and compliance efficiency. Be better positioned to manage asset allocation and risk, and provide greater transparency. This helps you provide independent wealth management solutions – aligning interests and places you on the same side of the table as your clients.

Clients will enjoy access to Agora's elegant and intuitive online portal where they can view investment holdings, monitor performance, download statements and tax receipts.

▀ RETAIN FULL CONTROL OF THE CLIENT RELATIONSHIP

WHILE AGORA DOES THE HEAVY LIFTING IN THE BACKGROUND

Our legacy-free platform empowers us to be nimble and to evolve to your changing needs and those of your clients. We will continue to enhance our dynamic platform and provide deep bench strength in practice management resources to help grow effective practices and build scale to compete today and into the future.

We believe it is time to raise the prominence of the independent advice channel. Are you ready to scale your business and build more wealth? **Contact us today!**

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