

Pershing Digital Portfolios™

Did You Know?

The average age of digital advice account holders is 40+, meaning it's not just for Millennials

What are the benefits for you and your firm?

- › Easy to implement
- › Ability to serve low-balance accounts
- › Provide investors with a quick and easy way to invest
- › Ability to serve digitally inclined investors
- › Serves a wide range of clients—from do-it-yourself to full-service clients
- › Tested and trusted models
- › Grow your business by connecting with new investors
- › Complements Pershing's advisor-facing advisory offerings

What are the benefits for your investors?

- › Engaging user-experience
- › Available through NetXInvestor
- › Anytime, anywhere access
- › Lower fees
- › Automated rebalancing

Set-it-and-forget-it simplicity

- › Automated re-balancing

It's a digital world and investors are looking for a digital experience. With the new digital advice feature in NetXInvestor®, meeting investors' needs has never been easier.

Why we built Pershing Digital Portfolios

Having access to a digital experience is becoming an important option for many investors, so we're making it a part of our platform. We've developed a new proprietary digital advice solution to help you grow your business, improve efficiency and gain a sustainable competitive edge in a rapidly evolving digital marketplace.

We have expanded the choices offered to our clients by creating a simple, one-stop-shop product. The investor-facing solution, a feature within our NetXInvestor® portal, is deeply integrated into the Pershing ecosystem.

How did we build it?

Pershing Digital Portfolios integrates our managed account operational capabilities, and the NetXInvestor user-experience.

Welcome to digital wealth management.

Digital Portfolios Provides Choice

Pershing Digital Portfolios can integrate the investment products of Lockwood Advisors, Inc. (Lockwood), Pershing's affiliated registered investment adviser, as part of the product, providing a more turnkey approach. Or, your firm may opt to define and sponsor your own investment products. Either way, Pershing will operationally trade and manage these accounts, freeing up your advisors to spend more time with clients and prospects.



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Set a Goal

NETXINVESTOR

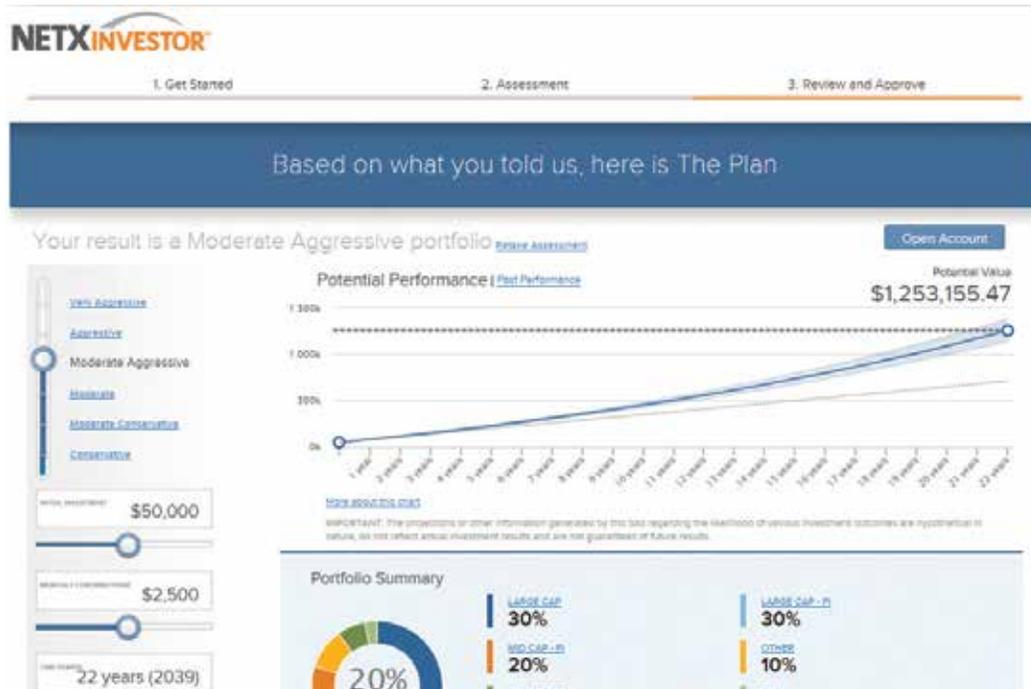
1. Get Started 2. Assessment 3. Review and Approve

I want to...

Save for Retirement Save Money Save for College Save for Purchase Save for Another Goal

Back Continue

Plan Proposal



To learn more about leveraging the power of NetXInvestor's digital portfolio feature, contact your Pershing Relationship Manager.

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