

USA FINANCIAL EXCHANGE™

Wealth Management Platform

A comprehensive UMA/TAMP offering for Investment Advisor Representatives of Corporate RIAs, Hybrid RIAs, and stand-alone RIA firms.

STRATEGY SELECT MANAGEMENT (SSM)

Key Features

- Access to multiple asset managers and strategies
- Strategies are made available within a single unified managed account (UMA)
- Hands-on transition assistance
- Ability to cost-effectively manage smaller accounts
- Simplified all-inclusive, asset-based custody pricing on assets other than no transaction fee (NTF) funds
- Multiple risk management strategies and diversification options available inside one account
- Performance reporting on all strategies within the account
- Ability to bring legacy assets alongside managed strategies

ADVISOR INTEGRATED MANAGEMENT (AIM)*

Features include access to all strategies contained within SSM plus:

- Simplified block trading and cross-model trading for representative to serve as portfolio manager
- Integrated fee billing engine
- Comprehensive offering of NTF fund for representative as portfolio manager trading
- Ability to mix and match private strategies alongside strategies available through USA Financial Exchange SSM platform

Firms that reach AUM of \$25 million with Exchange will also have access to:

- Assigned relationship/service manager with custodian
- Customized mobile app
- Private label statements and web portal

**Use of the advisor integrated management platform requires prior firm approval for discretionary authority.*

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