



Securities America

Your Business Growth Expert

For more than 25 years, Securities America has created innovative solutions to help independent advisors grow, perfect and secure their business.

Your search for a new broker/dealer won't be complete without talking to Securities America.

Leader in Technology

Securities America will always be an industry leader in technology, because innovative and intuitive systems help advisors provide extraordinary service to their clients. Our comprehensive resources and tech support help advisors maintain a highly efficient practice, providing a foundation for growth and profitability.

Securities America's streamlined new client process seamlessly populates forms directly from our CRM system, creating digital account documentation from processing to image storage. Using our add-on digital pen technology, advisors can capture every handwritten note, chart, picture or client signature generated during meetings. We've even integrated technology into compliance processes to help advisors protect their practice, creating an ultimate ease-of-doing-business environment.

The first comprehensive Income Distribution Solution – NextPhase®

Advisors today need to educate and engage clients about retirement income planning. To do that, they need a comprehensive system to create, monitor and manage predictable income streams. Securities America partnered with Investnet to develop NextPhase™, a time-segmented income distribution application embedded into our fee-based Managed Opportunities® platform. That's just part of the picture. Securities America's wealth management staff understands the entire income distribution cycle – the process, the products and the impact on advisors' revenue.

Innovative Advisory Solutions

Since 1994, Securities America has provided flexible fee-based solutions to support the independent hybrid advisor on one fully integrated platform. Our signature Managed Opportunities® platform, an innovative asset allocation system, helps advisors easily manage clients' money. Whether they use third-party money managers, manage the money themselves, or both, advisors get a flexible system with consolidated proposal generation and performance reporting.

Vanguards in Practice Management

Cerulli Associates has called Securi-

ties America a "vanguard in practice management," and nothing showcases that better than Next Level, our exclusive practice-building program. Next Level combines the best of our business consultations, coaching, fee-based conversion services, and research from our \$1 million advisor survey. Participants give it rave reviews, and many experience significant growth within a year of completion.

In 2010, advisors need positive reasons to reconnect with prospects and clients and capture new business. To help them, we've introduced New Conversations, a comprehensive suite of coaching, implementation support and marketing tools to address topics such as: Client Re-Discovery, NextPhase™ Retirement Income, and Attracting Dollars in Transition.

We created Advisorpod.com, a website dedicated to providing financial professionals with relevant best practices and actionable tools. Each Advisorpod 10-minute podcast features a downloadable tool to help advisors implement the ideas presented.

We're ready when you are.

To learn more about why your broker/dealer search should include Securities America, call us today at **800.989.8441** or visit www.joinSAI.com.

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