



## One Clear Focus: Making Your Life Easier

**W**hen it came to technology, Jim Weglein thought all BDs were created equal. Then he joined Securities America.

"I didn't get it till I got here. My previous BD talked about technology investment, but it was spending that time, money and effort on its self-clearing platform and not on technology to help advisors," Weglein said. "Now I appreciate the value of a broker-dealer that invests its own dollars in technology that makes *me* more efficient, and leaves the clearing technology to the national firms that excel at it."

Securities America's technology mission puts you and your clients first. Whether designing new systems or analyzing third-party software, we start with input from you and your support staff about how you do business every day. We understand that to maximize technology adoption and satisfaction, the end-user experience must drive our technology enhancements. Intuitive technology with just-in-time training resources makes your practice more efficient, giving you more time to service clients, build relationships and attract new clients and assets.

Our advisors were among the first in the industry able to do business any time, any place on any device with mobile access to our clearing partner platforms and to our advisor workstation. Using electronic signature and mobile check deposit,



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you can offer clients a truly paperless experience while still providing your own high touch level of service.

Securities America's advisor workstation dashboard earned the Technology Innovation Award from the Bank Insurance & Securities Association and a spot on the InformationWeek 500 List of Technology Innovations this year. **So while other BDs are apologizing for their technology, we're winning awards for ours.**

Our tech innovations include:

- the freedom to pull up client portfolios, place trades and access your advisor workstation with your smartphone or tablet

- free document imaging and storage with SAI Vault

- our own smartphone app – the first among independent BDs!

Is your BD focusing its technology investment on you? Don't wait while they play catch up. Call Securities America and get ahead.

Learn more about paving the way for growth by making your practice more efficient. Download a **FREE** digital copy of **Connect! magazine**, the award-winning publication from Securities America. **Go to: [www.SecuritiesAmerica.com/connect12](http://www.SecuritiesAmerica.com/connect12)**.

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Registered Investment Advisory Firm.

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