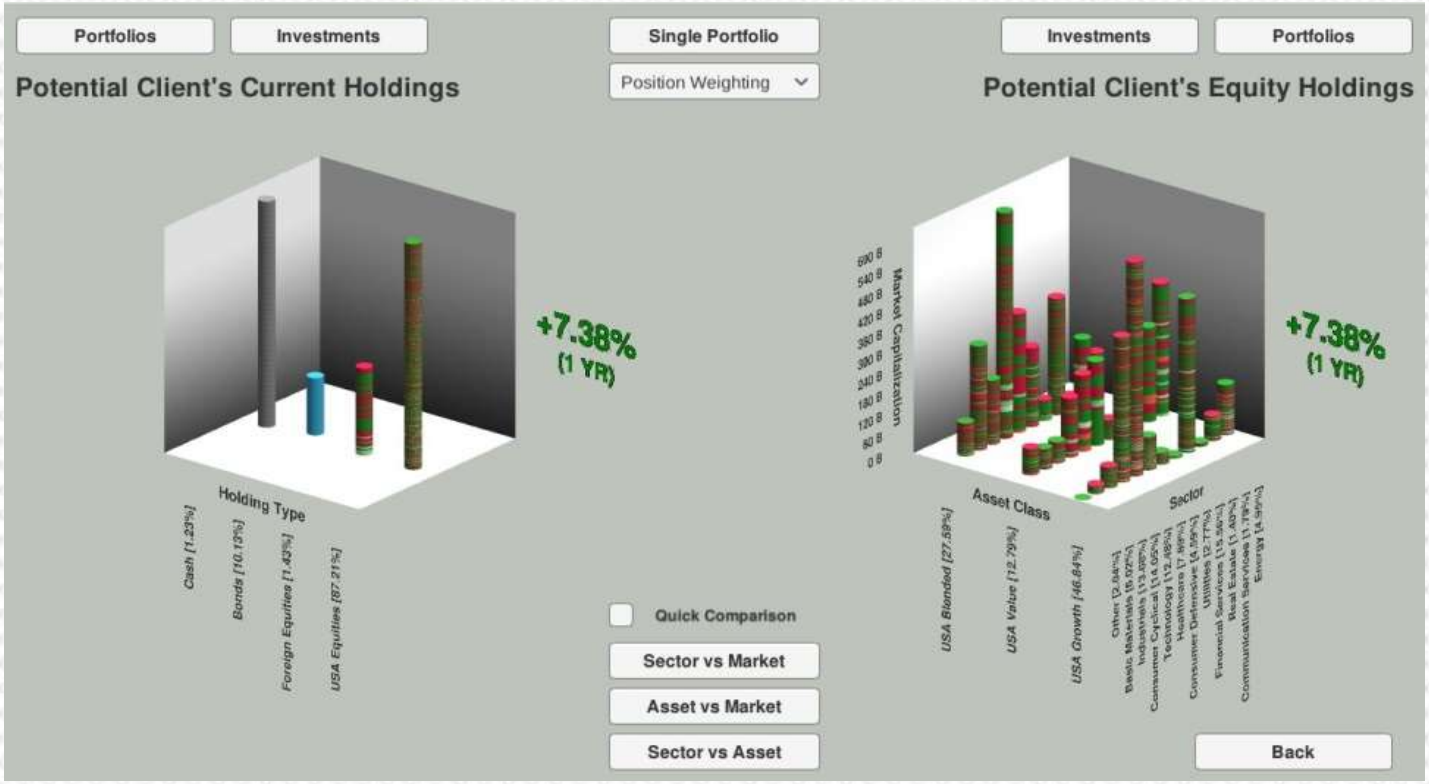
Be Efficient

Increase AUM

Document Interactions



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Who We're Working With

- 4 Top 20 Independent Adviser Networks
- 3 of 20 Largest Banks in the country
- 5 Star Wealth Managers.
- Top 50 Wealth Management Firms
- PlanAdvisor Top 100 Teams
- NAPA Young Guns

REDTAIL TECHNOLOGY

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What Our Customers are Saying

"This puts me way ahead of the competition."

- Casey M., Adviser

"The Cube answers my clients' questions visually."

- Jeff L., Adviser

"It's very understandable and attractive."

-Barbara K., Financial Planner

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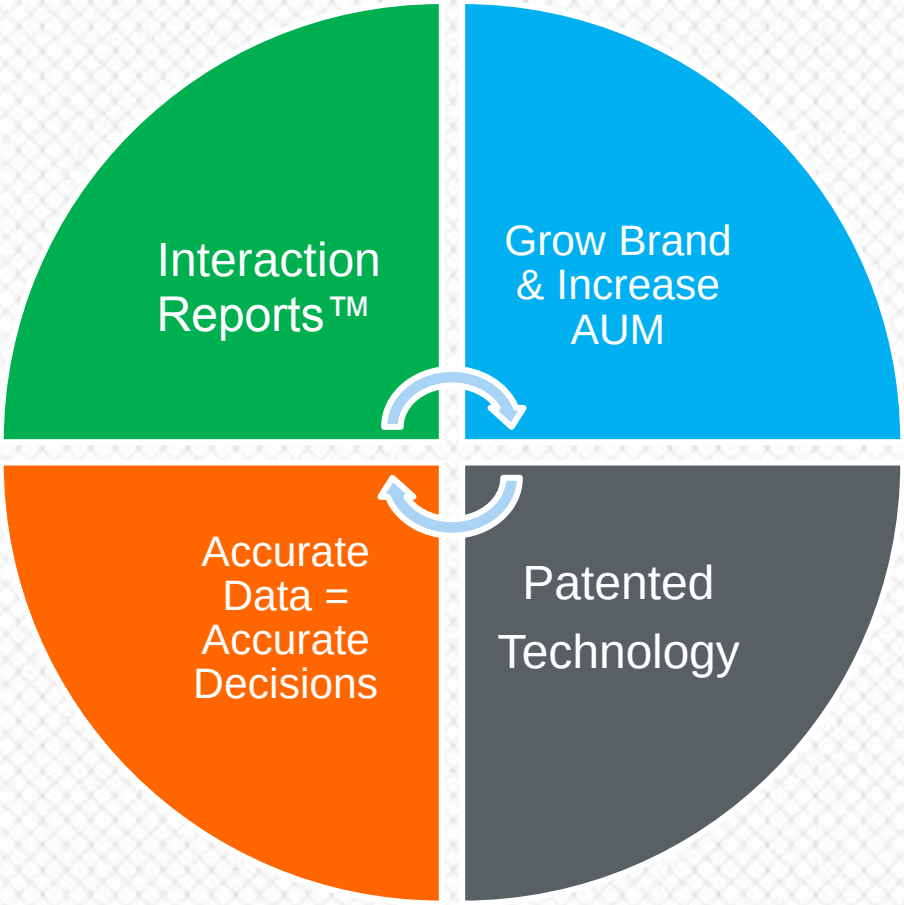
Value Adds



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Interaction Reports™

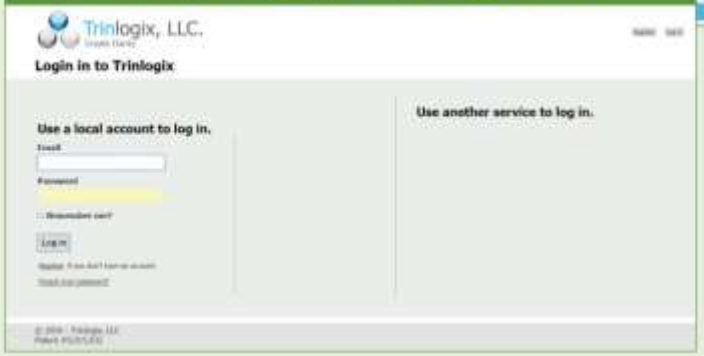
"A Seatbelt to Keep Our Practice Secure." – Financial Adviser

Access for Advisors

- Log in via company website or dashboard.
- Or log in via Trinlogix company site.
- All advisors are given unique login and password to be personalized.
- Compliance oversight can view all users accounts.
- All log in portals can be customized.

VIEW AND BACK-UP INTERACTION REPORTS OF ALL USERS

CUSTOMIZE YOUR LOG IN PROCESS AND PROCEDURES. THE TRINLOGIX DEVELOPMENT TEAM IS HERE TO WORK WITH THE SPECIFIC NEEDS OF YOUR FIRM



BISA TECHNOLOGY INNOVATION AWARD 2017

E-signature Capability

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Why It Works

- A better way to review and monitor.
- Interactive Experience
- Interaction Reports™ are fully searchable.
  - Client Meetings
  - Investment Oversight
  - Client Participation

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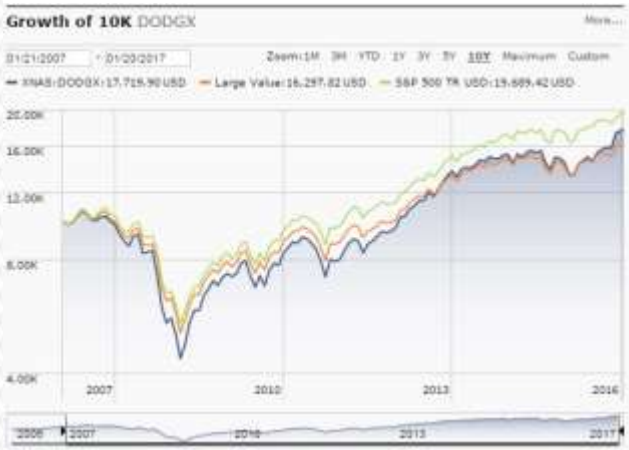
Does This Look Familiar?

Dodge & Cox Stock DODGX | ★★★★ | Gold



Performance DODGX

More...

	YTD	1 Mo	1 Yr	3 Yr *	5 Yr *	10 Yr *
Growth of 10,000	10,116	9,946	13,797	12,996	20,759	17,720
Fund	1.16	-0.54	37.97	9.13	15.73	5.89
+/- S&P 500 TR USD	-0.39	-0.71	13.12	-0.47	1.77	-1.12
+/- Category	0.42	0.01	9.92	1.84	3.67	0.48
% Rank in Cat	19	51	5	12	1	37
# of Funds in Cat	1,301	1,299	1,246	1,069	913	668

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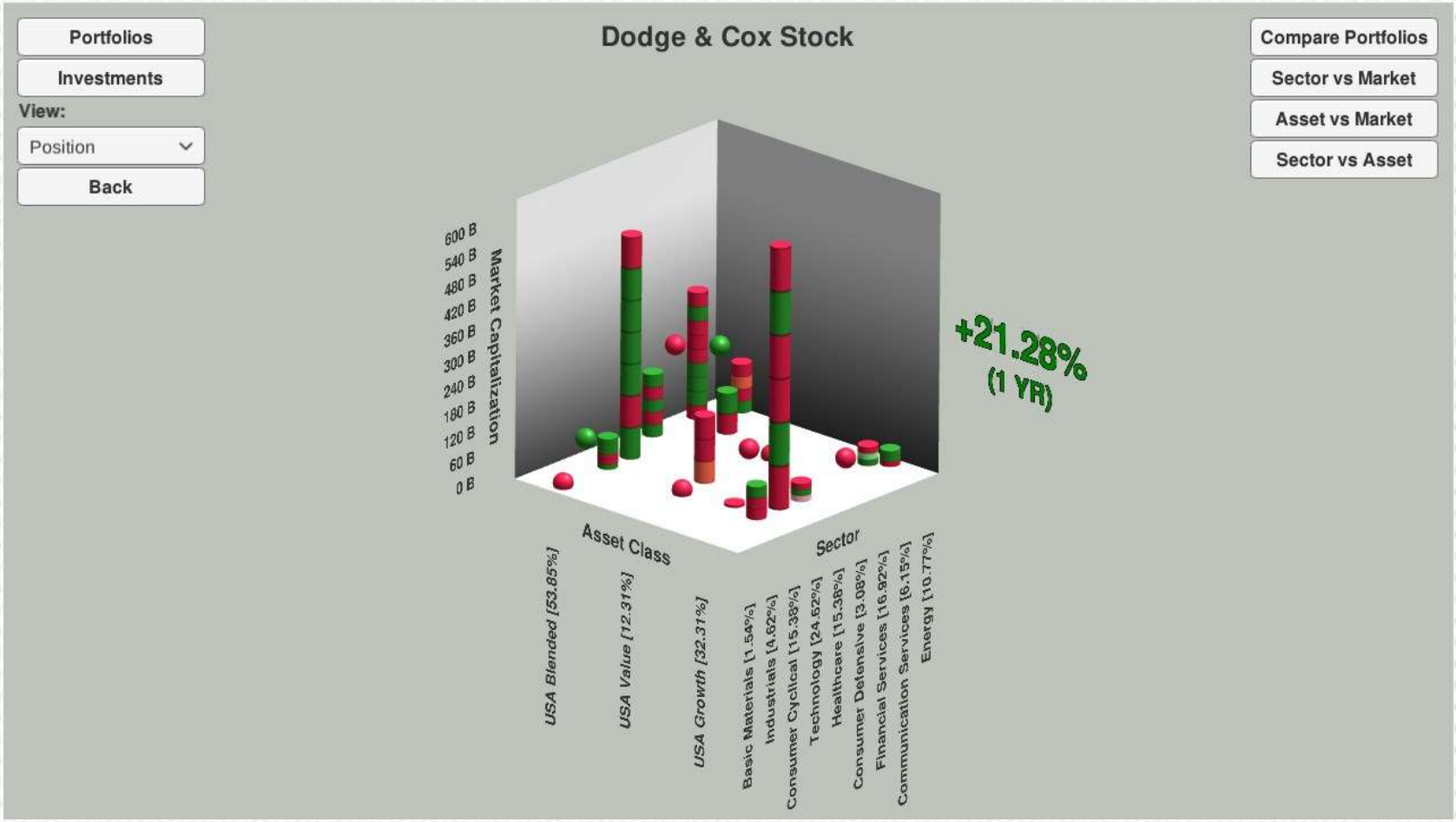
Trinlogix Turns It Into This



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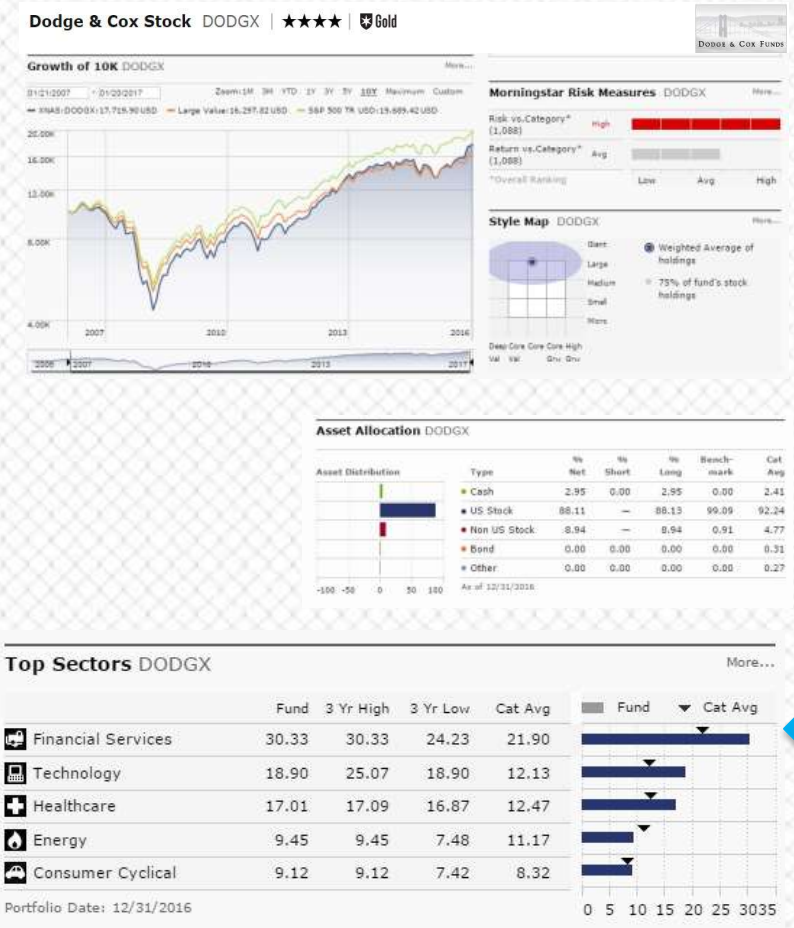
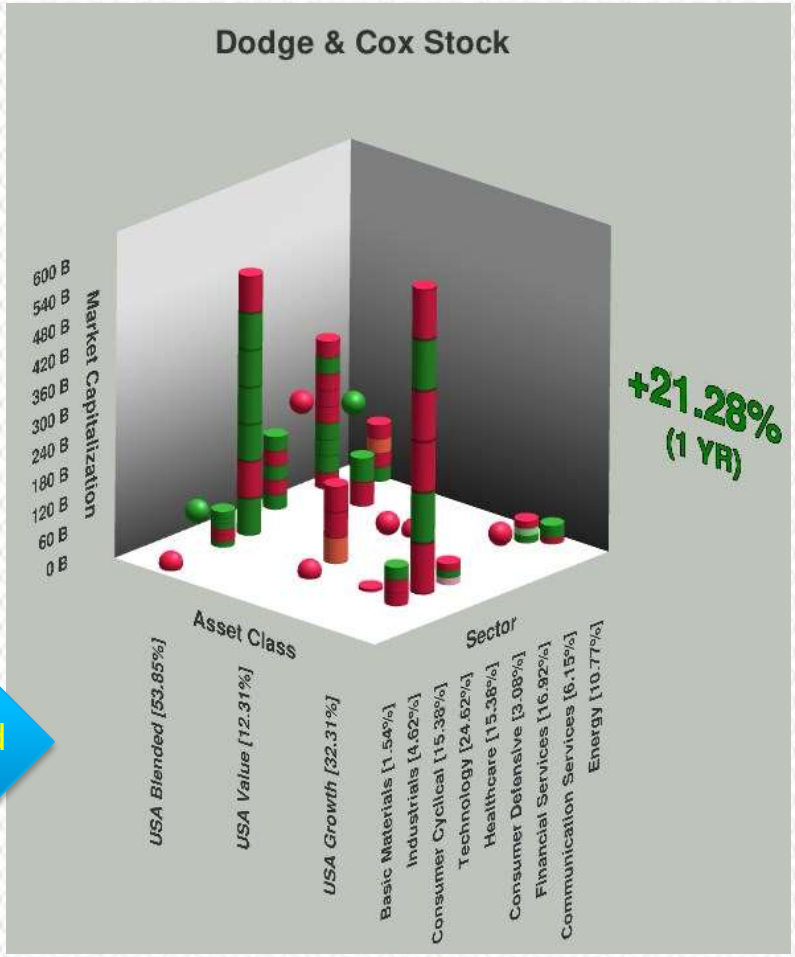
More Visual for Advisers



Same Fund



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Understanding the View

Terminology Key:

Cube - Motion 3D Interactive Cube

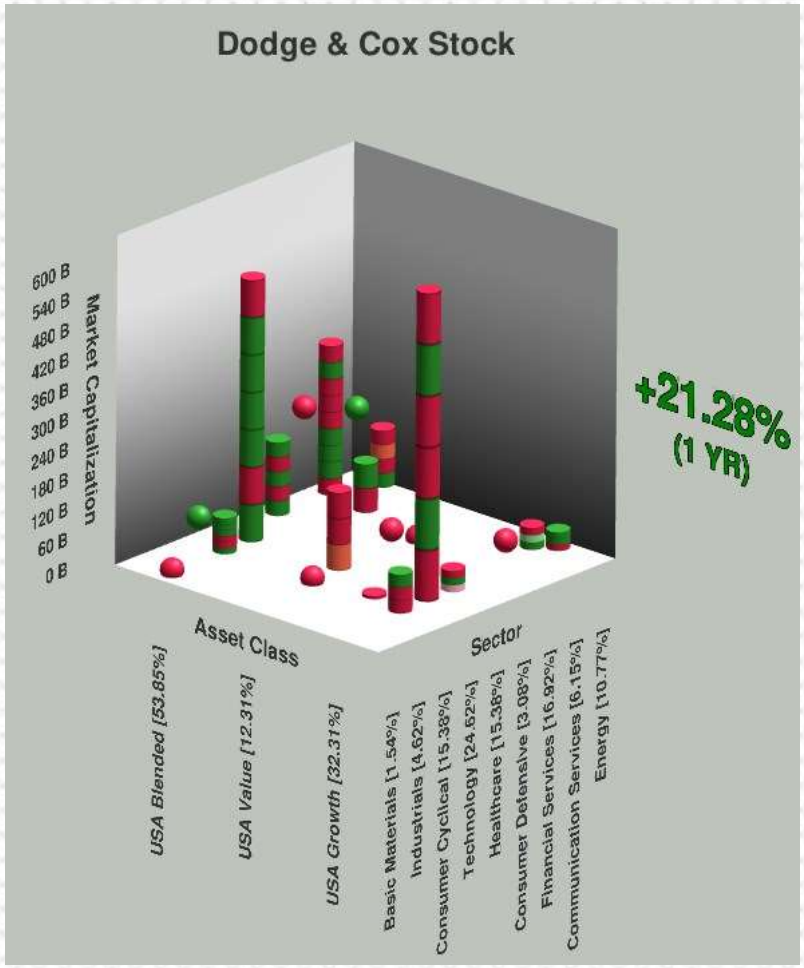
Axis – Market Capitalization,
Asset Class & Sectors

Spheres – Individual companies

Columns/Chips – Multiple companies

Heat Sensing – Indicates underlying Performance

Green = up
Red = down



Customizable Percentages

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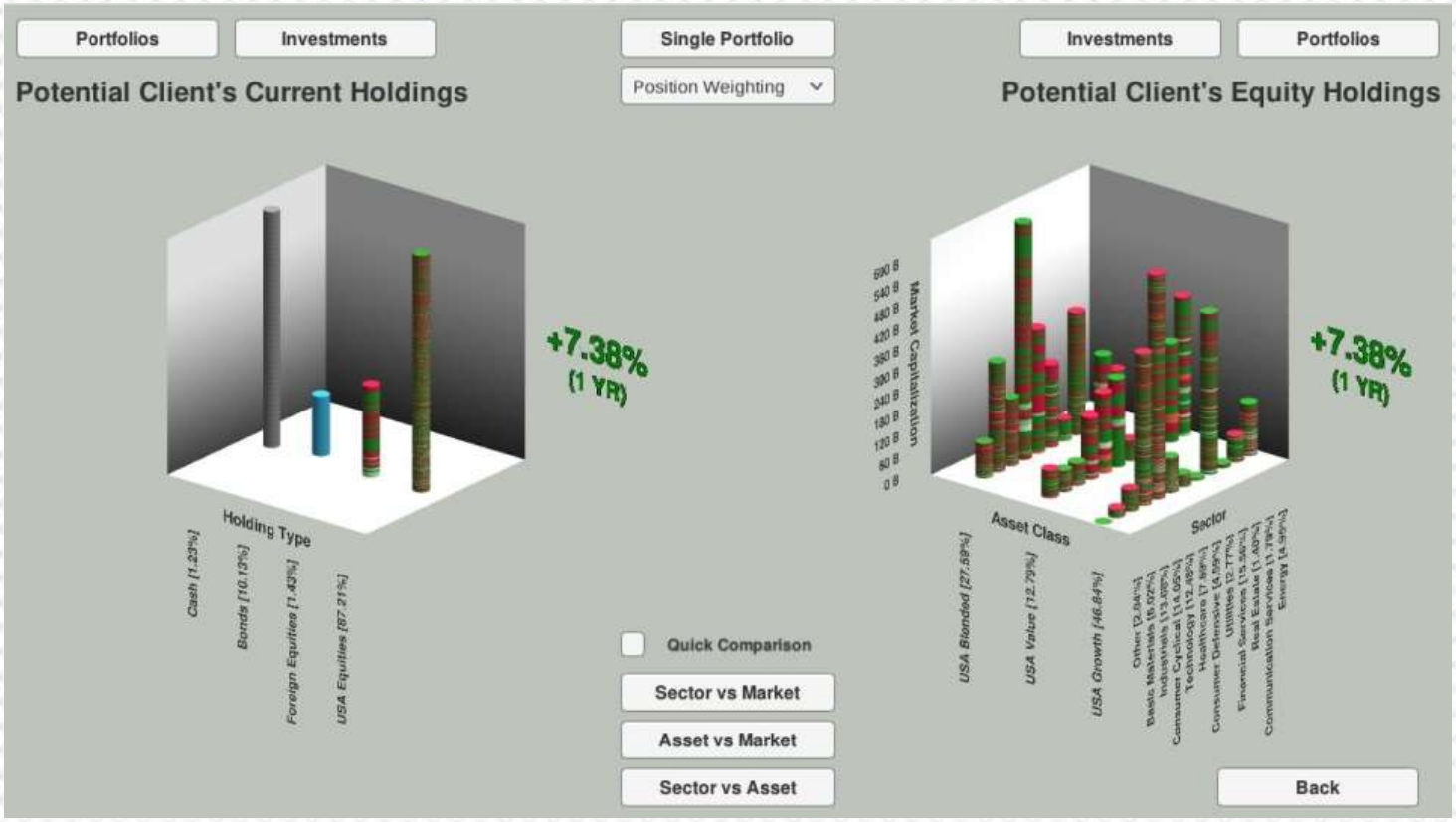
Enjoyable, Effective, Efficient

- 72% of people prefer a motion view per recent MIT study.
- Use in conjunction with other standard reporting methods.



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Integration

- Integrate into a Current Web Page or Dashboard.

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Month to month Subscriptions
Full concierge service

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New GUI Preview

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API First Design

Tech Specs

OPERATING SYSTEM:

The software will support the following operating systems –

- iOS
- Android
- WebGL

PLATFORM:

Unity WebGL – latest version 5.4.1 is used to render the motion 3D cube view.

CODE:

The software is written using Javascript, PHP, and C# – utilizing JSON to send data via the API.

SSO SOLUTION:

Single sign on capabilities readily available for integrations.

API FIRST APPROACH:

The software has the API carry out actions on its behalf using authorization tokens, with an accompanying user identifier (the user's numerical ID). This API is a web service, and works via POST requests.

WEBSERVER:

The webserver is designed to run the admin console and powered by the following software:

- Nginx for the webserver
- PHP for processing

DATABASE SERVER:

For the best security, the database has unique users, which limit what data certain parts of the software can access. Furthermore, the users are only allowed to connect to the database over a local connection within the same datacenter (DigitalOcean NYC3) This means that no database traffic travels over the Internet, and ping times are extremely low, leading to the highest level of efficiency and security.

ADMIN CONSOLE:

The Admin Console is the main user interface and allows user to carry out functions such as, but not limited to, creating portfolios, adding investments to portfolios & viewing portfolios. The admin console is hosted on the Web Server and is written using the following languages:

- CSS – or Cascading Style Sheets, defines the look of the Admin Console
- Javascript – for API AJAX requests via jQuery, among other things.
- HTML
- PHP

SECURITY:

All of Trinlogix' services are highly secured. Our traffic passes over secure connections that utilize the most recent security standards, protecting user information from being accessed via all known SSL exploits. Our servers also use a strong Diffie-Hellman group (2048 bits) to ensure strong encryption keys.

All of our publicly hosted services have an A rating from SSL Labs.

THIRD PARTY ACCESS:

Users can create tokens that have a limited scope of access to a user's account. This will allow third parties to interface with Trinlogix to carry out actions on the user's behalf.

FULL INTEGRATION:

Trinlogix has the ability to fully integrate its tool into a website or other portal (via an iframe) as well as provide SaaS through the use of its secure servers, connecting via a JavaScript API or allow licensing of code to be operated from client's servers.

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Thank You

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