

Client Profiler



Prioritizes Client's and Prospect's Needs

- The Client Profiler uses a smart questionnaire to develop financial priorities and a client profile
- Scores each planning topic
- Uses ReasonText™ to explain results

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|-------------------|---|
| Retirement Income | <div style="width: 100%; height: 10px; background-color: green;"></div> |
| Education Funding | <div style="width: 100%; height: 10px; background-color: green;"></div> |
| Survivor Needs | <div style="width: 50%; height: 10px; background-color: yellow;"></div> |
| Estate Planning | <div style="width: 10%; height: 10px; background-color: red;"></div> |

Product Profiler



Product Type Selection

- Maps needs and preferences to product types
- Scores each product category for “fit”
- ReasonText™ is used to explain each product category fit
- 401k/IRA rollover analysis compares fees, features and client's preferences of a current 401k/IRA to other IRA options

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|-------------------------|--|
| Deferred Annuity | |
| Managed Account | |
| Mutual Funds | |
| Self-Directed Brokerage | |

Product Wizards



Specific Product Selection (Make and Model)

- Scores specific products that best fit the client's needs from firm's approved products
- Explains product fit with ReasonText™
- Compares products side-by-side

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|----------------------|--|
| FIA Lincoln | |
| VA Prudential | |
| VIA AXA | |
| DIA XYZ | |

RightBRIDGE Product Wizards

- **Annuity Wizard**
Annuity Selection
(VA, VIA, FIA, DIA, SPIA, FA)
- **Investment Wizard**
Investment Selection
(Mutual Funds, ETFs, UITs)
- **Insurance Wizard**
Insurance Selection
(Term, WL, VL, UL, VUL)

Client Profiler

The RightBRIDGE Client Profiler is a needs-based engine that identifies all relevant client opportunities in a financial professional's book of business. RightBRIDGE sifts through the entire prospect and client base and identifies the most compelling opportunities and more importantly presents them with detailed ReasonText™ explaining why each suggestion is relevant.

Product Profiler

The Product Profiler® uses a scoring methodology to help determine which investment vehicles or product types are appropriate for an individual client. These suggestions are combined with ReasonText™ that explain why a product type fits or doesn't fit a client's needs.

Annuity Wizard

The RightBRIDGE® Annuity Wizard helps advisors determine which annuities available on their product shelf are best suited to meet their clients' needs, objectives and preferences. The Annuity Wizard uses a sales intelligence engine to find the best available products across all annuity types. Supported annuity types include: Variable, Fixed Indexed, Investment Only Variable, SPIA, DIA and Fixed Annuities.

Investment Wizard

The RightBRIDGE® Investment Wizard uses the RightBRIDGE® engine to help determine the relevance of specific managed investment products for a client's goals and objectives. Using key client data the scoring engine can identify an appropriate asset allocation and help determine an appropriate fund program and the select investment products that are available from the company's inventory of products.

Life Insurance Wizard

The RightBRIDGE Insurance Wizard uses a sales intelligence engine to determine the amount, mix and type of insurance for a client's needs and objectives. The engine then compares the different type of insurance and rank orders those that best meet the client's objectives.



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