

# Addepar Informs Resonant Advice

Sound decisions are built on transparency. Making informed investment decisions that help you meet goals, such as retirement, wealth transfer or charitable objectives can be complicated by an array of unique and ever-evolving challenges.

Resonant Capital Advisors uses a leading reporting technology called Addepar to make it easier to see how your money is allocated, discuss how to guide your decisions and make more informed recommendations regardless of where your assets are held.

## UNDERSTANDING THE BIG PICTURE

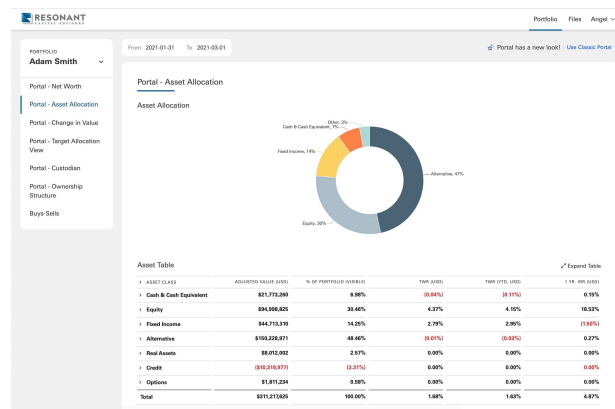
Resonant's partnership with Addepar provides clients a platform that not only un-clutters and simplifies their financial lives, but also allows Resonant to provide them truly holistic wealth management advice. By aggregating multiple investment accounts into a single, comprehensive platform, Addepar allows both clients and Resonant to view their financial "Big Picture" in real time. Clients enjoy greater financial clarity, organization and the peace of mind knowing that Resonant has the tools to answer their questions and make recommendations with their *total portfolio* in mind.

Addepar's platform allows Resonant to:

- See each client's total wealth in a single place | Gain a holistic and transparent view of client portfolios on a single screen or report
- Perform detailed analysis | See performance over various time periods to determine which investments are performing well and where adjustments need to be made to achieve client goals
- Customize advice | Tailor what and how data is represented, allowing Resonant to answer client portfolio and performance questions in real-time and in a format customized by client

## TRANSPARENCY AND DEPTH

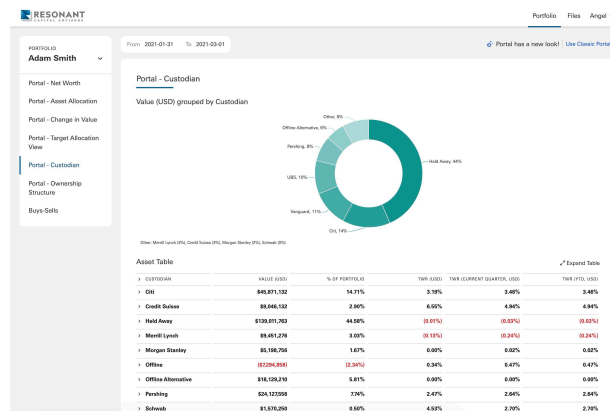
Clients get a complete picture of everything they own—from stocks and bonds to alternative investments including real estate, private equity, hedge funds and private collections—regardless of where the assets are held. Total wealth transparency allows clients to see portfolio and security returns over varying time periods against proper benchmarks, regardless of management.



## DETAILED ANALYSIS

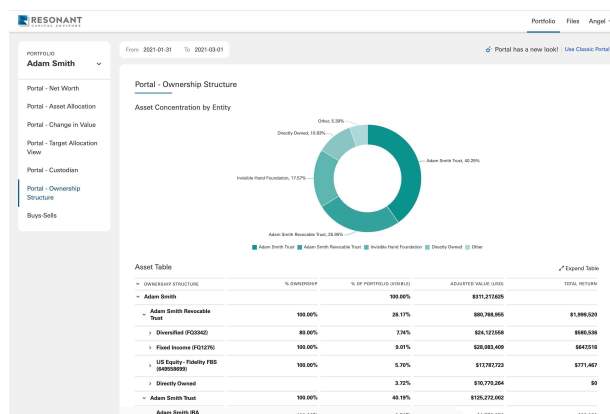
Addepar's modern capabilities allow a broad-based view of client wealth to help Resonant better understand and better align their wealth with their goals - not just for the specific assets Resonant manages, but also across clients' entire asset base. Addepar also allows Resonant to track performance over time, evaluate investment performance and quickly make adjustments should market conditions or client goals change.

Resonant can also easily set up and maintain differentiated levels of asset viewership. This allows consolidated review of a client's total family assets, or for analysis of a single entity, trust or account down to individual securities. In addition, clients can take a holistic view to easily understand their exposure across all their assets—to help them effectively mitigate risk.



## PERSONALIZED ADVICE

Dissecting multiple reports across numerous managers and asset classes can make it challenging for clients to determine what requires their attention. Using Resonant's simple-to-read and easily digestible reporting and access-from-anywhere client portal, clients can view tailored reports displaying their entire household, portfolios and asset performance in a layout customized for them.



## Your success is our priority.

Please reach out to Resonant Capital Advisors ([info@resonantcapital.com](mailto:info@resonantcapital.com)) or at 608-733-6220 to discuss how you can jump-start meaningful financial conversations informed by sound perspective.

Addepar is the financial operating system that brings common sense and data-driven investing to our financial world. Addepar gives asset owners and advisors a clearer financial picture at every level, all in one place. It handles all types of assets denominated in any currency. With customizable reporting, financial advisors can visualize and communicate relevant information to anyone who needs it. Secure, scalable, and fast, Addepar is purpose-built to power the global financial system. Over 400 single and multi-family offices, wealth advisors, large financial institutions, endowments, and foundations manage over \$1.7 trillion in assets on the Addepar platform. Addepar has offices in Silicon Valley, New York, and Salt Lake City.