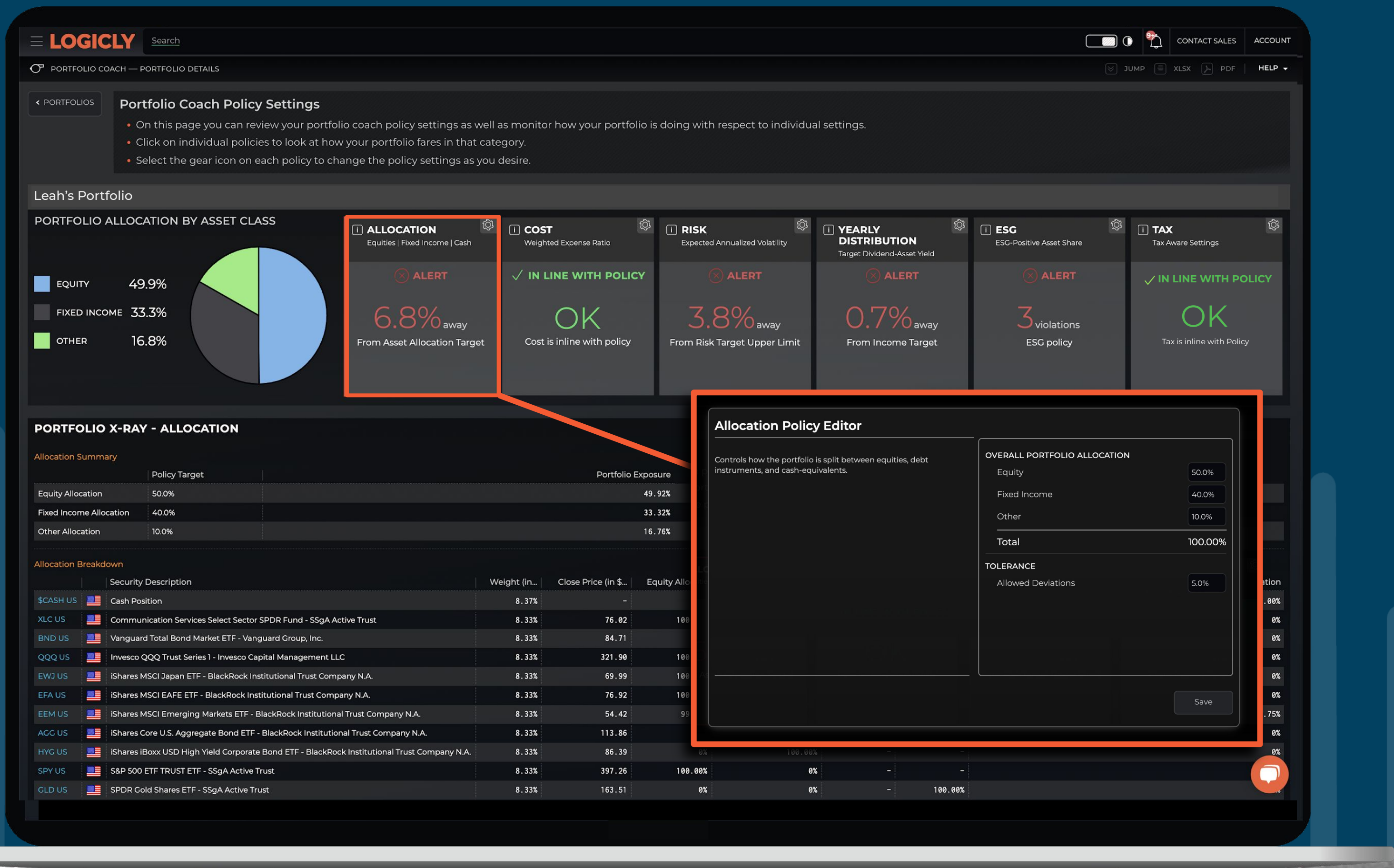
LOGICLY
Portfolio Coach

A digital portfolio strategist on your team



The LOGICLY Portfolio Coach

is the future of scalable and personalized portfolio management.

Portfolio Coach empowers the advisor to easily build, manage and scale client portfolios on their own, with a little guidance from Logicly.

Today, advisors spend over a quarter of their time on investment management. With Portfolio Coach you can deliver more customized portfolios to more clients in less time.

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ETF LOGIC

PORTFOLIO COACH

Your Digital Portfolio Assistant
Automated Monitoring - Alerts - Rebalances

The LOGICLY Portfolio Coach simplifies your day-to-day workload around portfolio management, keeping portfolios aligned to a policy and generating important alerts to capture opportunities when they arise.

What can Portfolio Coach do for you and your clients?

Monitor

Connect your client’s portfolios to Logicly and receive policy alerts, rebalancing notifications, as well as potential trade ideas to improve cost, performance, lower risk and monitor your tax liability.

Generate an audit trail on every decision made in your portfolio. Pinpoint those decisions down to specific policy suggestions from the Coach such as risk reducing, yield enhancing, asset allocation rebalancing...

Scale

Advisors spend around a quarter of their time on portfolio management today. With the Logicly Portfolio Coach, that time can be reduced while providing unique and tailored portfolios for your clients.

Portfolio Coach makes it easy for an advisor to scale out their portfolio models to more clients in an easy and efficient manner.

Manage

Portfolio Coach reduces portfolio management friction by helping lower extra management fees. Create policies to track model portfolios or customize for asset allocation, cost, risk, income or ESG.

Numerous industry studies have shown that investors experience higher risk-adjusted returns when more timely rebalances keep them close to their targets. The Coach helps you and your clients stay close to your targets.

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