LOGICLY PRO

Changing the conversation.

LOGICLY PRO helps you transform your client conversations by showcasing the value of your advice.

Get closer to clients. Connect with them on a deeper level.

Talk about the big picture

- Find and validate portfolio ideas for clients
- Compare two or more portfolios or investment choices
- Engage clients by reviewing IPS policies: asset allocation, cost, risk, income, ESG, tax aware investing

Strategize a personalized asset allocation

- Uncover how clients really want to allocate investments
- Set client-driven deviations for policy drift
- Decide which portfolio alerts should be most important

Illustrate to clients how cost affects portfolios

- Get on the same page with clients about investment cost
- Compare similar securities to see what matters most
- Show clients that you're acting in their best interests

Determine the required yield for income-focused clients

- Get ideas for increasing income where needed
- Guide clients in setting and updating income policies
- Show clients the impact of one choice over another

Show why risk is important for clients to understand

- Show clients how each position affects risk
- Get clients to discuss their willingness and ability to take risk
- Find what motivates clients to change risk policies

Elevate client engagement, attract new clients and increase loyalty by monitoring key IPS elements all while ensuring Reg BI compliance.

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Scan to learn more about LOGICLY.

LOGICLY PRO

LOGICLY helps you recover time, and create capacity in order to expand your business.

Engage socially-conscious clients

- Talk to clients about ESG strategies to include in their portfolios where desired
- Guide clients in deciding which ESG exposure they want: Fossil Fuels, Alcohol, Tobacco, etc.
- Find what matters most to clients by talking about ESG investment ideas

Show why it's important to remove behavior from decisions

- Outline tax benefits of selling some positions and keeping others
- Steer clients from decisions that act against their own best interests
- Illustrate trade ideas to replace positions sold with similar positions

Connect each client's values to the IPS

- Talk to clients to find out how they really want to invest
- Find out what matters most to clients with a theme-based questionnaire

Changing the conversation for thousands of advisors.

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