



Proposals Dashboard

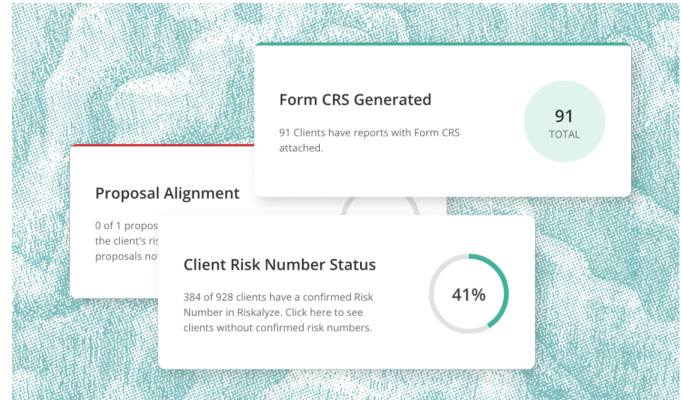
Track the growth and retention of your clients through the delivery of compliant, aligned, and effective proposals.

- Select
- Elite
- Ignite
- Ultimate

Track which clients have Risk Numbers

The Risk Number establishes a common language between your clients, advisors, and home office. Now you can determine how many of your active clients, leads, and prospects have Risk Numbers and which advisors are building proposals in alignment with clients' risk tolerance.

This clarity not only fosters trust and communication with clients but also provides a consistent approach to compliance, safeguarding your firm's integrity across ever-changing regulatory rules.



Client Name	Advisor	Form CRS Status	Risk Number Status	Proposal Alignment
Robert Clark	Jeffrey Deane	Form CRS Generated	Confirmed	Aligned
Alma Anthony	Michael Smith	Form CRS Generated	Confirmed	Aligned
Chris Knight	Shane Deane	Form CRS Generated	Confirmed	Aligned
Michael Salazar	Jeffrey Deane	Form CRS Generated	Confirmed	Aligned
Greg Walker	Shane Deane	Form CRS Generated	Confirmed	Aligned
Sam Cook	Shane Deane	Form CRS Generated	Confirmed	Aligned
Robert	Shane Deane	Form CRS Generated	Confirmed	Aligned
Barb Buchanan	Shane Deane	Form CRS Generated	Confirmed	Aligned
Lisa Lewis	Michael Smith	Form CRS Generated	Confirmed	Aligned
David Frost	Michael Smith	Form CRS Generated	Confirmed	Aligned

Ensure delivery of compliant proposals

The Proposals Dashboard offers a panoramic view of your entire book of business, including clients, reports, and proposals across your firm. It empowers your executive team to see which clients have Risk Numbers, who's received Form CRS, and which advisors are building proposals in alignment with client Risk Numbers. This dashboard not only provides executive oversight but also streamlines the alignment of investment strategies with client expectations.

LEARN MORE AT [NITROGENWEALTH.COM](https://nitrogenwealth.com)



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