Proposals Dashboard

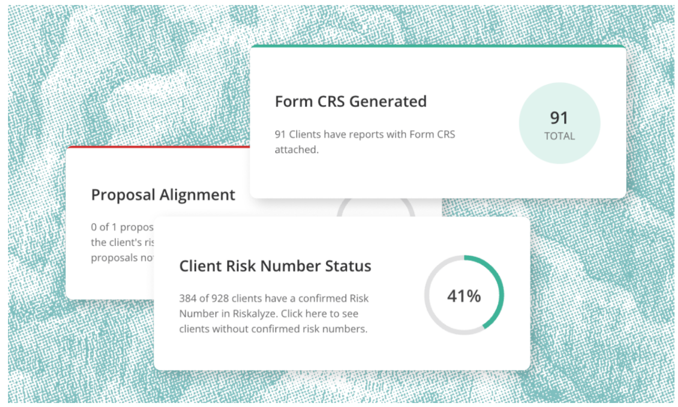
Track the growth and retention of your clients through the delivery of compliant, aligned, and effective proposals.

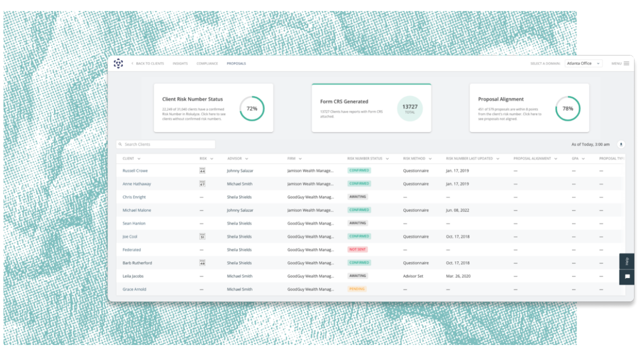
- Select
- Elite
- Ignite
- Ultimate

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.





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

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