$ymbil

Save Your Money By Investing with Ladenburg®

$ymbil is a dynamic online investment adviser platform that assesses the risk profile of an investor and recommends a risk-appropriate managed Ladenburg Fund. Ladenburg Thalmann Asset Management ("Ladenburg") is an SEC Registered Investment Advisory firm established in 1982. We have over $4 billion in assets under management and a dedicated staff of professionals with over 100 years of combined investment management experience. To learn more about us, please visit http://www.ltam.com

$ymbil is for all types of investors from novice investors opening their first account to the expert who wants a simple, quick, and easy way to invest. The questionnaire places your client into 1 of 5 portfolios based on the clients age, goals, time horizon and tolerance for risk. Everything entered into the $ymbil questionnaire is dynamic which allows an algorithm designed by Ladenburg to help make the investment decisions. The sign up process takes less then ten minutes and the minimum investment is only $500.

Benefits to Advisor

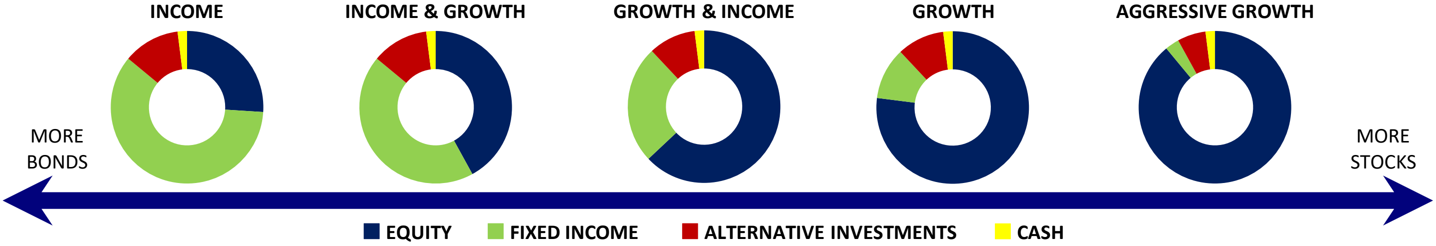
- One time form to be approved as a solicitor for $ymbil
- Receive a unique URL to link or send to clients
- 20bps referral fee annually on assets paid quarterly
- Ladenburg as RIA takes on the fiduciary responsibility
- Build relationships with children of top clients
- Attract millennial generation clients
- Free up time by transferring smaller clients
- Create recurring revenue
- Efficiency of operations
- Access to clients account information
- Rollover small accounts
- Solicit In all 50 States

Benefits to Client

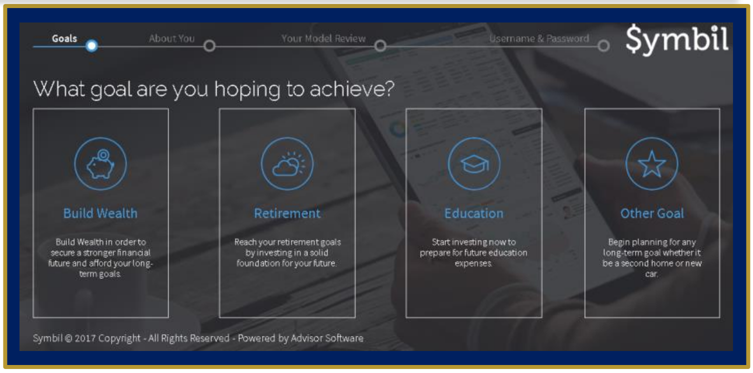
- Simple investing backed by trusted professionals
- Actively managed portfolios
- Automated investments Plan (AIP/PIPs)
- Easy to use online investor portal
- Review account performance
- Utilize digital financial tools
- Make updates or changes online
- Small investment to get started
- Electronically re-assess risk
- Rollover investments to fund new goals
- Retirement savings calculator
- Education savings calculator

$ymbil Investments

- Five actively managed mutual funds ranging from conservative to aggressive that Ladenburg will recommend based on your answers to some risk questions.
- Allocations differ based on the risk profile and the selected Fund based on the clients profile.
- Account Types Available:
  - Individual/ Joint/ IRA (Traditional/Roth/Rollover) UGMA/ UTMA/ TOD/ Minor Roth
- These portfolios are Ladenburg's new ETF Mutual Fund Portfolios. For more info visit www.Ladenburgfunds.com



How $ymbil Works



In a matter of minutes $ymbil recommends a risk appropriate portfolio based on a risk questionnaire, calculated using an proprietary algorithm consisting of four key components:

1) Investors age
2) The goal of the investment
3) Risk tolerance
4) Time horizon

Goal Based Investing

$ymbil allows you to create and name a goal for every account you open. Once you have been recommended a portfolio, fine tune your settings to ensure you reach your goals.

Whether adjusting the initial contribution, ongoing contributions or time horizon, our platform will re-calculate projections to ensure you get the right mix to increase the likelihood of achieving your goals.

How to become a solicitor to $ymbil

1. Request a $ymbil Solicitation Agreement by contacting support@symbil.com
   - This agreement is the only Paperwork required in the process
2. Sign and return the solicitation agreement to support@symbil.com to begin the approval process
3. Once you are approved a solicitor you will receive your own dedicated URL to solicit investors to $ymbil

Your unique $ymbil URL

- You have receive your own dedicated URL to $ymbil once you are approved as solicitor. This link effectively leads to a version $ymbil that is yours, and ensures you get credit for all accounts opened via this link. Which is why you should use this link anywhere you like - on your website, in emails, on social media and more - to drive people to $ymbil

Advisor Portal

- You will be able to track all of the traffic that goes through your URL in your Advisor portal that you will be able to set up once you are approved as a solicitor. In the advisor portal you will have access to investors who funded their accounts, total AUM of your solicited investors, and other analytics of traffic flowing to your URL.

Available on the App Store

GET IT ON Google Play

Search "Symbil Robo"

Support@symbil.com
www.symbil.com