

## \$ymbil Upload Guide

- You have your own dedicated URL to \$ymbil. This link effectively leads to a version of \$ymbil that is yours, and ensures you get credit for all accounts opened via this link. This is why you should use this link - on your website, in emails, on social media and more - to drive people to \$ymbil.\*
- 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 have funded their accounts, total AUM of your solicited investors, and other analytics of traffic flowing to your URL..
  - Additionally, you will be able to set messages to alert you when a solicited investor account reaches \$100,000.

### Add a \$ymbil tab to your website

Home

About us

Market Watch

\$ymbil

Contact Us

- Content to add to your website

“\$ymbil is a dynamic online investment adviser platform that assesses your risk profile and recommends a risk-appropriate managed portfolio. In only a few minutes, you’ll be invested in a diversified portfolio, based on your objectives, and on your way to long-term saving and investing. All online, simple, and seamless. The portfolios available through \$ymbil are actively managed by experienced investment professionals and tactically adjusted based on changes in the market.”

To learn more and start investing click the \$ymbil logo below. Once you are invested you can establish online account access as well as access through the \$ymbil app.



Make the \$ymbil logo a button that goes to your \$ymbil advisor link:

1. Right click the logo
2. Select hyperlink
3. Copy/paste your unique URL in the address bar

- Add the \$ymbil client video to your website <https://www.youtube.com/watch?v=F9M7YtaqQvM>
  - Below the video insert text “To learn more about \$ymbil click here” (Hyperlink “here” to your unique URL
  - Contact [support@symbil.com](mailto:support@symbil.com) if your programmers require the MP4 file to embed the video into your website

### Add \$ymbil to your e-mail signature

Name  
Company  
Address  
Phone

Add your URL to your e-mail signature:

1. Right click the “here”
2. Select hyperlink
3. Copy/paste your unique URL in the address bar

Click here to be recommended a professionally managed risk appropriate portfolio in a matter minutes.



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### Social Media Posts:

Facebook/LinkedIn/Twitter



- Write a creative post (samples below)
    - Want your investment account to be actively managed, but don't want the higher fees? Click [here](#) to get started with a risk appropriate portfolio through \$ymbil. (hyperlink "here" to your unique URL)
    - Put that tax refund to work and open your \$ymbil account by clicking [here](#) (hyperlink "here" to your unique URL)
    - What is your risk tolerance? Check out \$ymbil's website to assess your risk level. Invest completely online in a matter of minutes by clicking [here](#) (hyperlink "here" to your unique URL)
    - Are you graduating this year or have a family member or friend who is? What are you/they going to do with that graduation money? You could spend it, or starting at \$500 you can invest it in a risk appropriate portfolio in a matter of minutes that is actively managed by investment professionals.
  - Include the Intro to \$ymbil Client Video to all of your social media post.
    - <https://www.youtube.com/watch?v=F9M7YtaqQvM>
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### Share our Marketing Material:

- Use the \$ymbil e-mail template to send clients and prospects your unique URL and the Intro to \$ymbil Client video included
- Bring the co-branded \$ymbil client fact card to your next event or meeting
- All materials can be found on your broker dealers intranet site or by contacting [support@symbil.com](mailto:support@symbil.com)

*\* Check with your Home Office Compliance Department before posting any securities-related content on social media sites.*