

DIGITAL ADVICE FOR BANKS

We team with banks and other financial services firms to bring a superior digital investing experience to life for their advisors and clients.

As a leader in digital advice, Jemstep provides a modern solution for banks to offer goal-based investing to clients. Our Advisor Pro service supports home offices, advisors, and end-clients, with an integrated digital advice platform that spans the full advisory lifecycle.

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June 2019

Jemstep offers deep integration with BNY Mellon's Pershing

May 2019

Jemstep Announces Completion of SOC 2 Type II Audit

May 2019

Jemstep Launches Digital Advice Platform on Salesforce AppExchange

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to serve an entire client base with a modern digital investment solution.

Bank-grade advice platform

Goal-based approach to wealth management plus deep analytics give banks a path to deeper client relationships.



Seamless integration

Adaptable to fit your technology ecosystem and easy to use for advisors and clients

Data security

Meets requirements of top-tier financial institutions

Open investment architecture

Choose the investment products that suit your clients' needs

PLATFORM



Forward-looking

Learn more about how we can help you succeed.

Strategic input

We start with your business needs, to provide a digital solution that evolves your service model

Customer insights

We know the direct-to-consumer channel, but we don't compete with you

Culture of partnership

From technology to investment management to marketing, we help meet your business needs

FinTech know-how

Our analytics and insights leverage the branch network to increase adoption and usage by advisors and clients



WHY JEMSTEP



Innovative &
experienced



User-centric design and enterprise solutions are part of our FinTech expertise

Practical ingenuity

With over 10 years of digital advice experience, we can help you create efficiencies for advisors to focus on client relationships

Stability and expertise

With the financial support and security of Invesco, we can meet a bank's complex needs, now and in the future

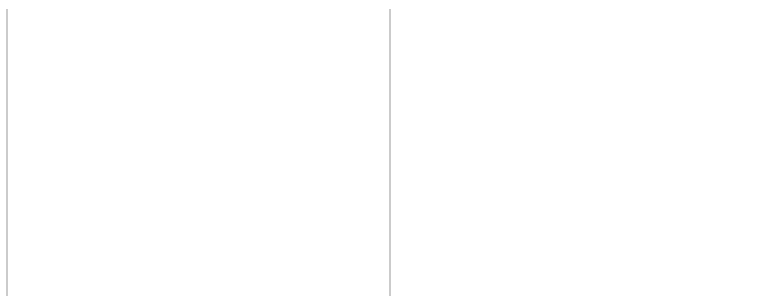
ABOUT US



WHO USES ADVISOR PRO?

Advisor Pro can be tailored for your business needs.

[JEMSTEP SOLUTIONS >](#)



Banks &
Credit
Unions

Insurance
Firms

Broker-
Dealers

RIAs

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Got a minute? Take a sneak peek
and get to know Advisor Pro.

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In 20
minutes,
we'll
show
you how
Advisor
Pro can
work for

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