



THE COMPLETE WEALTH MANAGEMENT PLATFORM

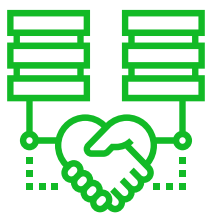
From a single dashboard, access and manage your clients' entire wealth portfolio from anywhere, with ease.

REDEFINING WEALTH MANAGEMENT FOR OVER 20 YEARS

Founded in 1999, Ndex has become the leading independent multi-custodial wealth management technology provider in North America, and is rapidly growing in Europe, the Caribbean and Africa. For over 20 years we have consistently evolved our platform to ensure wealth management professionals can meet the ever-changing needs of the industry and their clients. Today, Ndex supports over 1300 firms managing +200 billion in assets for more than 14 million clients.

POWERED BY DATA, OPTIMIZED THROUGH AUTOMATION

Ndex has reimaged the entire wealth management lifecycle so that you can focus on what matters most - your client's financial independence



DATA AGGREGATION

Capture financial data from any source - custodian direct feeds, web-portals, PDF statements, custom Excel templates - into one unified application



DATA NORMALIZATION

Our patented technology ingests, reconciles and normalizes data for reporting, exporting and analytics. Ndex ensures consistency across all sources and data formats



DATA UTILITY

Once the data has been processed, export it to ANY downstream third-party application



REST APIs

Turn Ndex into your proprietary financial services engine. Apply your firm's customized, branded interface onto our platform in order to complement your existing processes and seamlessly meet the diverse needs of your clients. We'll take care of the rest.

ONE PLATFORM. CUSTOMIZED TO YOUR NEEDS

Compliance / CRM / Individualized Access & User Management / Fee Management / Bulk Order Entry / Securities Management / Document Management / Pooled Funds/Portfolios Management / Comprehensive client financial data on demand / Consolidated Portfolios /Integration with 3rd party planning & analytics tools / Advanced Data Extraction Tools / Comprehensive Reporting / Modeling / Rebalancing / Income Tax Reconciliation / Data Reconciliation / Trading / Client On-boarding / Prospecting / Branded Client Portal



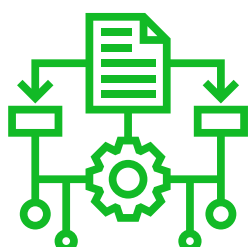


ACCESS ANYWHERE

Our web-based application allows you to work seamlessly from any location.

1.

2.



COMPLETE DATA INTEGRATION

More than 20 years in market - Ndex has created the industry's largest platform to effortlessly collect client data from any source and formatted to deliver it to your existing applications or to the Ndex dashboard.



ROBUST REPORTING AND RECONCILIATION

Provide your clients with a better understanding of their finances, reconcile taxes in a cost-effective and efficient manner, and define a clear-cut path to financial independence.

3.

THE NDEX DIFFERENCE

- ✓ **20-YEAR COMMITMENT** to innovation
- ✓ **200+ CUSTODIANS** across North America
- ✓ **5 PATENTS** focused on building in-depth investor profiles, modeling and structuring portfolios tailored to individuals, and aggregating investment data from infinite sources into a single application to produce state-of-the-art reports and reconciliation calculations.
- ✓ **EXTENSIVE PARTNER COMMUNITY** representing Financial Planning; Market Quotes and Research; Performance and Risk Analytics; and Accounting

NDEX GUARANTEES IMMEDIATE COST SAVINGS AND AN OPPORTUNITY TO INCREASE REVENUES QUICKLY

TO LEARN MORE OR SCHEDULE A DEMO CONTACT US: INFO@NDEXSYSTEMS.COM, OR CALL +1 514-288-0908 EXTENSION 202