TECHNOLOGY SOLUTIONS TEAM

You’re supported by a team of technology experts.

Get the most out of your technology platforms with help from the National Planning Holdings® Inc. (NPH) Technology Solutions Team. Get personal, in-office training and assistance from your regionalized external technology specialist, or you can always call an internal specialist for answers to your questions over the phone.

This resource is available across the entire NPH network of broker-dealers, so all advisors can better use their technology to further grow their business and serve their clients.

BETTER SERVE CLIENTS

- Review assets by metrics such as client, automated household and custom household
- Create consolidated statements on demand or by an automatic generation schedule
- Sort clients by holdings, profitability, age, or by custom-created segments
- Boost efficiency with e-sign and e-delivery
- View holdings details such as benefit values, exchange dates, withdrawals, additions and fees

MONITOR BUSINESS PROFITABILITY

- Track AUM and production goals
- Track key business indicators by household, product sponsor, age, revenue and more
- Navigate trends by identifying revenue fluctuations
- Identify investable assets

MAXIMIZE TIME

- Use less paper and reduce “not in good order” rejections with guided form completion
- Integrate Redtail and Laser App with EOE
- Get all the info you need in one place with centralized sponsor data
- Reduce redundancy with single sign-on
- Streamline your workflow with quicker signature options and efficient trade entry

Remember, expert advice is just a call away.
See reverse side for team member contact information.

*BANK INSURANCE & SECURITIES ASSOCIATION (BISA) TECHNOLOGY INNOVATION AWARD, 2015.

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ICA – 844-862-9345
NPC® – 844-862-9344
SII – 844-862-9343
Contact your external technology solutions specialist for assistance with:
• Setting up Advisor Dashboard®
• Developing EOE work flows
• Training new advisors and staff

Contact your internal technology solutions specialist for assistance with:
• Running reports
• Data questions
• Advisor Dashboard questions

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MID-ATLANTIC
Open
This position is currently open.
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