



FOR IMMEDIATE RELEASE:

Level Four Advisory Services Launches Enterprise-Wide Digital Advice With Trizic

SAN FRANCISCO, CA -- MARCH 10, 2017 -- Trizic, the leader in enterprise class digital advice technology, today announced that Level Four® Advisory Services (“Level Four”), a \$2.2-billion Registered Investment Advisor (RIA) and diversified wealth management firm, has deployed Trizic’s digital advice platform across the Level Four enterprise.

The Trizic platform is being used by Level Four to seamlessly automate profiling, account opening, model management and trading across the firm.

Level Four’s traditional RIA business is leveraging Trizic to help drive new account acquisition within their target markets, including among others, younger Millennials and digitally focused clients. The solution also enables the firm to cost effectively manage existing accounts, both large and small, using Trizic’s completely automated account management system across Level Four’s distributed workforce of approximately 150 employee advisors and independent advisor reps.

Level Four is also deploying the Trizic platform to power a new digital offering named MyDigitalAdvisor. The debut product suite enables the easy onboarding and management of referral accounts driven to Level Four by its outside partners and affiliates. In addition to onboarding and automating account management, Trizic’s platform is also managing the streamlined referral and association of the new accounts with specific advisors.

“As we looked at the complexity and economic challenges of deploying automated digital advice across our firm, along with taking a proactive stance to intended DOL guidelines, it became apparent that we needed a solution that is institutional grade, flexible, and cost-effective to meet the needs of our growing organization,” commented Jake Tomes, Level Four CEO. “Trizic offered us all of that and more, which made them an obvious partner for Level Four.”

While Trizic’s platform was architected to give larger institutional clients the comfort of an industry proven solution, it was also designed to let clients request and receive firm-specific enhancements in rapid fashion.

“Level Four asked for some unique access management enhancements that were needed by their firm to define complex user-level responsibilities within the home office and across the larger enterprise,” said Drew Sievers, CEO at Trizic. “We were able to create and deploy their requested enhancements without extra cost and in a matter of a few weeks. The flexibility of our architecture allows us to drive new firm-specific features without branching our code and creating a maintenance burden on ourselves or a cost burden on our clients.”

ABOUT TRIZIC – Trizic provides enterprise-class, digital investment technology to wire houses, brokerages, asset managers, banks, credit unions, and Registered Investment Advisors. Trizic’s hosted platform was built from the start with the enterprise in mind. Trizic technology was architected and engineered to deliver cutting edge, end-to-end digital wealth solutions to the industry’s largest, most demanding players. The Trizic Platform is investment-product agnostic and accommodates ETFs, mutual funds, and equities. Trizic is a technology company and has no direct-to-consumer digital advisory offering. For more information, visit www.trizic.com.

ABOUT LEVEL FOUR - Based in Plano, Texas, Level Four® Advisory Services (“Level Four®”) is committed to being the firm of the future. Level Four is an independent, SEC-registered investment advisor that provides a broad array of financial services, including retirement planning, tax planning,

estate planning, risk management, education funding, investment management, employee and executive benefits. Level Four also offers extensive business development and operational support to accounting firms and financial professionals seeking to create a holistic financial services offering. Its office of supervisory jurisdiction (OSJ) provides support services to over 150 financial professionals, and its coaching and training services drives its philosophy across its members' practices. More information is available at www.levelfouradvisors.com.

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