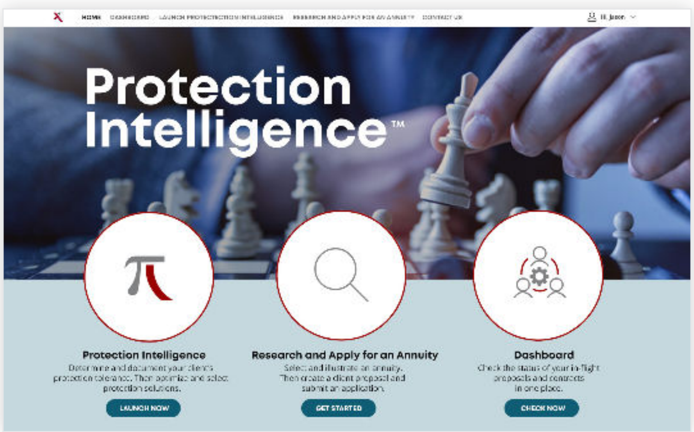
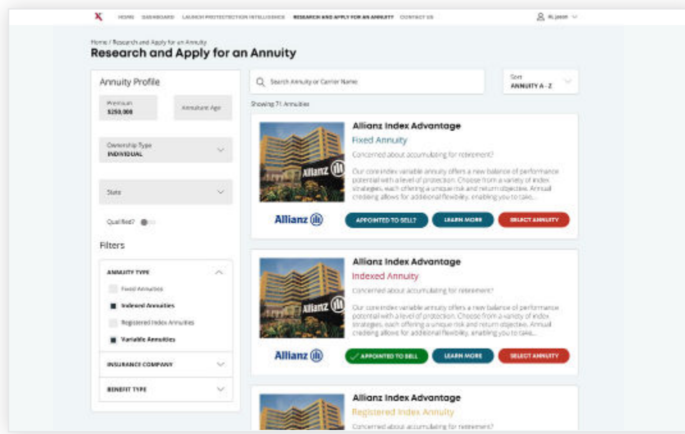
ANNUITIES AT YOUR FINGERTIPS

Access to income and protection solutions through FIDx Protection Intelligence™

FIDx Protection Intelligence serves as a retirement solution source by connecting insurance solutions with wealth management platforms and other providers, giving advisors expanded access, better client experiences, and elevated value.

We remove operational friction, addressing processing fatigue and increasing efficiencies. We provide direct, integrated access to a growing number of industry-leading insurance carriers and partners.





- Fully electronic application processing, including suitability packet, e-signature, and home office review queue
- Research annuities with direct integration to up-to-date carrier information
- Check licensing and appointments real-time directly with the carrier, prior to submission
- Annuity dashboard provides insights on upcoming events, 1035 opportunities, and daily valuation
- Comparison feature allows for quick identification of annuity distinctions
- Product rules, rider and sub accounts/crediting strategies restrictions, carrier compliant illustrations and more are all built-in to reduce NIGOs and improve the advisor experience
- Easy to use, intuitive interface

WE MEET ADVISORS WHERE THEY DO BUSINESS.

ENVESTNET Insurance Exchange	Incorporate annuities alongside of traditional managed accounts through the Envestnet Insurance Exchange.	HALO	Enable advisors to access and implement annuities alongside a best-in-class structured product platform.
ENVESTNET MoneyGuide	Allows advisors to access and implement annuities directly from the financial planning experience.	FIDX PROTECTION INTELLIGENCE	Access protections solutions directly through FIDx Protection Intelligence

WANT TO LEARN MORE?

Visit FID-x.com to learn more about how FIDx Protection Intelligence digitally enables advisors to access solutions that help meet the retirement needs of their clients.

FIDX™