

## Comparing Investment Processes



ANCORATO

VS



TRADITIONAL SMAS



Minimal or No Paperwork



Extensive Paperwork



Enhanced Scalability



Complex Administration



Faster Execution



Longer Time to Execution

## ANCORATO'S STRATEGY LINK PLATFORM

A comprehensive solution for advisors and firms to enhance SMA management, streamline operations, and efficiently utilize structured products.



- **Multi-Custodial Accessibility:** Seamlessly integrates with major custodial platforms, including Schwab, Fidelity, RBC, and more.
- **Simplified Account Management:** Eliminates the need for creating new accounts, unlike traditional SMAs
- **Enhanced Scalability:** Enables advisors to scale their usage of structured notes across multiple client portfolios efficiently.
- **Streamlined Investment Process:** Makes investing as simple as a few clicks of a button
- **Simplified Reporting:** Consolidates structured notes into sleeves, making performance tracking and reporting more intuitive and user-friendly.