



**TRADEMARK**  
FINANCIAL MANAGEMENT

## Tools for Success

Trademark Financial Management provides you with...

### Investments

SRI Model Portfolios  
Ten Risk Based Model portfolios  
Investment Consulting  
Monitor models, managers, market

### Operations

Trading  
Direct and Indirect Billing  
Performance Monitoring  
Performance & Tax Reporting  
Performance composite reports  
Investment Research & Due Diligence  
Cash Balance Monitoring

### Marketing

Monthly & Quarterly Market  
Perspective  
'What Worked' Blog Posts

### Technology

Web-based advisor portal to access  
your client data/reports  
Web-based client portal  
Encrypted file/folder sharing through  
Box.com

### Practice management

Training / best practices on TFM's  
technology offering  
Operational best practices (account  
opening, report generation, etc.)

**TRADEMARK FINANCIAL  
MANAGEMENT**

**FREING YOU TO DO MORE**