WEALTHADVISOR

THE VOICE OF THE FINANCIAL ADVISOR COMMUNITY

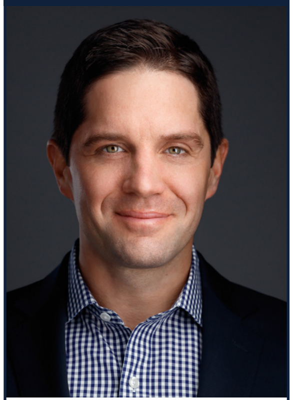
AMERICA'S BEST TAMPS™

2024

THE WINNERS LIST: OPPORTUNITIES FOR REGISTERED INVESTMENT ADVISORS (RIAs), BD REPRESENTATIVES, BANKS, INSURANCE COMPANIES, HEDGE FUNDS, ENDOWMENTS, FOUNDATIONS AND QUALIFIED RETIREMENT PLANS

DIGITAL ACCESS: TAMPS.COM

UX WEALTH PARTNERS
Kyle Wiggs
CEO & Co-Founder



Artificial intelligence has become mainstream and has helped many industries and society. So why has the investment industry resisted allowing this advancement to help produce better outcomes for our clients? Technology has challenged the status quo in every other industry, creating meaningful opportunities for those businesses and improved results. Yet the investment industry clings to a multi-decades-old theory aiming to achieve average.

When did it become acceptable for our industry to embrace a decades-old singular investment thesis and ideas ignoring actual investment advancements that can change the investor experience and advisor relationship?

UX is doing something about it. Clients will hear about AI- enabled investment advice eventually. The question for advisors is whether they will hear about it from them or another source.

We are partnering with 500 select RIAs across the country to modernize today's RIA.

It's time advisors choose a partner that will reignite their excitement for the business.

UX Wealth Partners, LLC
7200 S Alton Way, A-230, Centennial, CO 80112 • www.uxwp.com

UX Wealth Partners, LLC (UXWP) is modernizing today's RIA by delivering a scalable and flexible digital wealth management platform that is redefining all aspects of an RIA and empowering advisors to focus on exceeding client expectations. Most offer the same investment options leading to value confusion. Meet UX Wealth, the only TAMP dedicated to leveraging artificial intelligence and machine learning to modernize how advisors invest.

Investments matter: unmatched investment marketplace
We believe that investment outcomes matter. We're pouring resources into creating the world's best investment marketplace. UX is the only TAMP offering the world's leading technology and AI-driven investment solutions. We support advisor managed portfolios, offer an award-nominated SMA lineup, and the industry's first automated AI-driven UMA lineup. Advisors can seamlessly blend them together creating branded proposals and fact sheets.

Low risk offer
No client signatures. No repapering. No AUM commitments. A simple yes gains advisors a front row seat to industry-changing technology that is redefining how advisors invest for their clients and dominate their competition.

Access
The UX platform is designed to provide advisors with personal access to investment managers and key decision makers within major WealthTech firms. This level of access allows for a truly custom approach.

Legal and compliance support
While it can pose a threat to a RIA, our expert resources handle everything from legal, to compliance, to contracts. Compliance shouldn't be a burden.

Technology and IT guidance
Technology choices for today's advisors can be overwhelming, but it doesn't have to be. We've curated industry experts that advise our clients on everything from IT setup to creating the most unified technology stack, so advisors can focus on what they're great at.

Supercharged growth
All great businesses have a competitive advantage. We provide our advisors with two. First, our exclusive model marketplace will redefine how you speak with clients and improve their outcomes over time. Second, we offer market exclusivity to our partners. If you want a competitive edge over your competition, partner with us and be the only advisor in your market with access to our investment lineup and platform.

UX Wealth Partners, LLC is an SEC-Registered Investment Advisor.

STRATEGIC FEATURES

- ACCOUNT AGGREGATION
- ACCOUNT REBALANCING
- CLIENT-FACING PERFORMANCE REVIEWS
- CLIENT PORTAL
- COMPLIANCE TOOLS
- CUSTODIAN AGNOSTIC
- CUSTOMIZED PORTFOLIOS
- CUSTOM REPORTING SUITE
- INSTITUTIONAL CLIENT SUPPORT
- INTEGRATION WITH 3RD-PARTY PLATFORMS
- IPHONE OR ANDROID APP
- MARKETING SUPPORT
- MODEL MARKETPLACE
- PRIVATE LABELING
- RESEARCH & DUE DILIGENCE
- RISK MANAGEMENT TOOLS
- SUCCESSION PLANNING
- UNIFIED OR SMART BILLING

New business contact:
Larry Lotwin, Director of Sales
Phone: (760) 688-9984
Email: llotwin@uxwp.com
Website: Schedule a Demo

CONTACT

KEY TAMP PERSONNEL

CLICK IMAGE TO LEARN MORE

Kyle Wiggs
CEO & Co-Founder

Larry Lotwin
Director of Sales

Type of Program: TAMP, Third-Party SMA, Third-Party UMA, Advisor Constructed Models, Rep as PM, Traditional and Custom SMA & UMA, Open Architecture

Total Assets in Program: $1.92 billion as of 06/30/2024

Year Program Began: 2020

Managers on Platform Vetted: Yes

Managers GIPS® Compliant: No

Type of Products Available: AI, machine learning, ETFs, stocks, SMAs, UMAs, Advisor as PM, Asset Allocation, Customizable, Risk Based, Multi-Manager, ESG, Domestic, International, Thematic

Program Tracks Client Holdings: Yes

Program Compatible for: RIAs

Optimized for Tax/Trading Efficiency: Tax, no. Trading, yes.

Sleeve-Level Reporting: Yes

Program Links to a Trade Execution or Order Management System: Yes

Proposal / IPS: Yes

Asset allocation methodologies: Artificial intelligence, machine learning, AI sentiment, digital signal processing