

# Navigating the Modern Data Stack to Maximize the Value of Your Firm

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There has never been a more challenging time to navigate the future of your firm. Increased relegation, rapidly changing workplace settings, a rapid M&A appetite, and an aging advisor population is putting more stress than ever before on the teams running today's advisory firms, Broker-Dealers, and Advisor Platforms. Couple with that, the technology you need to scale your business, support your team and delight your clients - your firm is constantly faced with important decisions that will impact where you are headed and whether or not you will get to enjoy the journey.

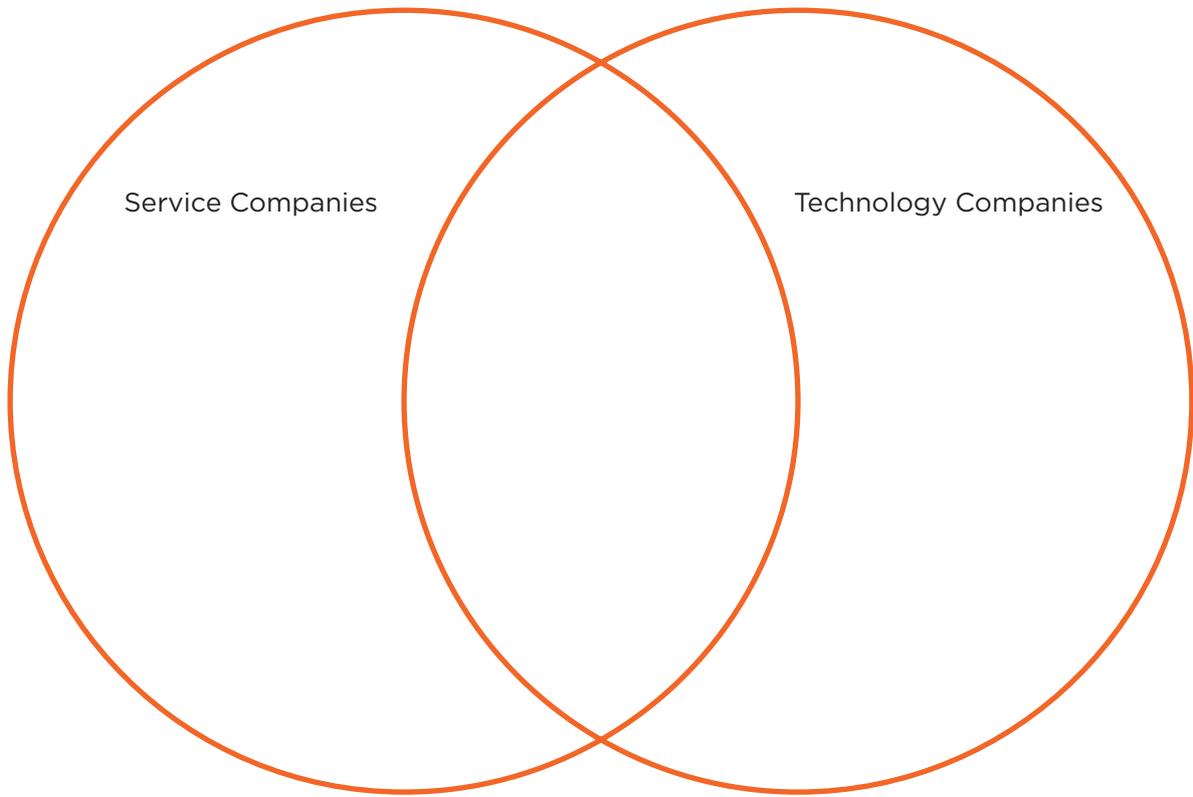
We founded Milemarker because we watched a wonderful industry struggle to navigate all the variables you face on a daily basis. While many companies talk about integration, most firms are still trying to find it. And as you become more reliant on technology, it is easy for one change in that provider's strategy to take your business in a different direction.

We believe in advisors, and we are dedicated to helping you navigate the future of financial advice. Today, Milemarker serves firms like yours with dedicated support, technology, and infrastructure to help you navigate the journey ahead. It's our pleasure to help you enjoy every mile.



Jud Mackrill  
Cofounder, Milemarker

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## Key Traits

- ✓ What are the key traits of the service companies you admire?
- ✓ What are the key traits of the technology companies you admire?



**Process is Your  
Intellectual Property**



**Most Every Client Problem  
Can Be Marketed**



**Productize Your Services**



**Good Marketing is  
Always Teaching**



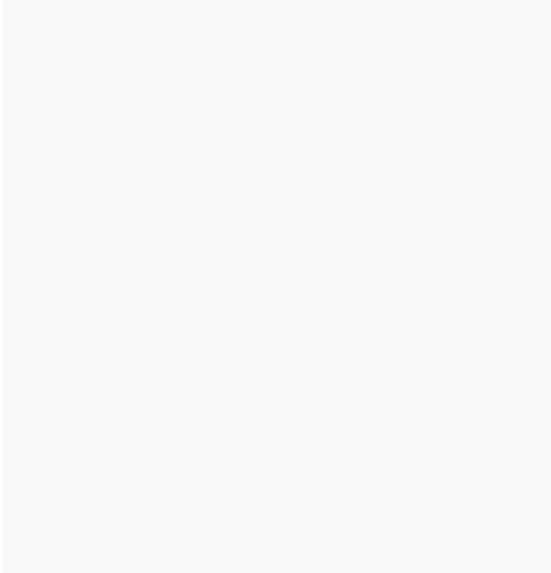
**Repeatable Is Undefeatable**

“When you think about your goals, don’t just consider the outcome you want. Focus on the repetitions that lead to that place. Focus on the piles of work that come before the success.”

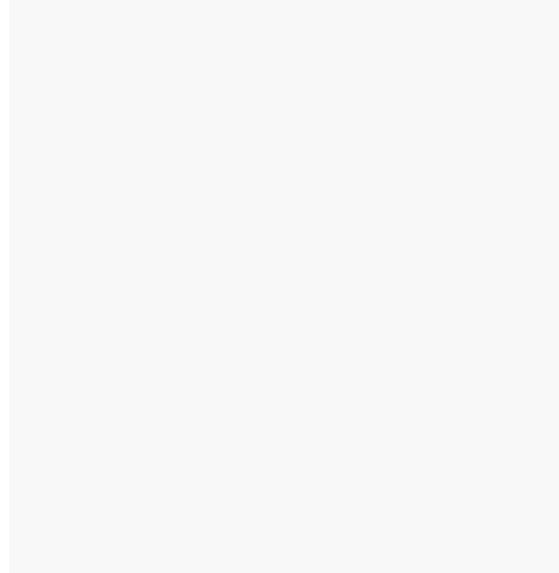
James Clear



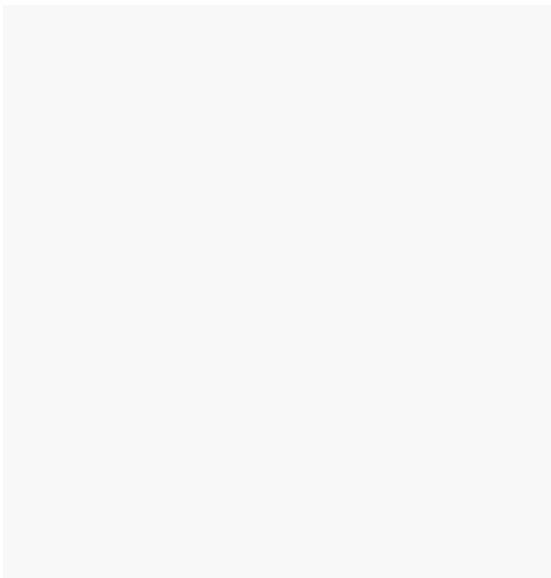
Who are all of your customers?



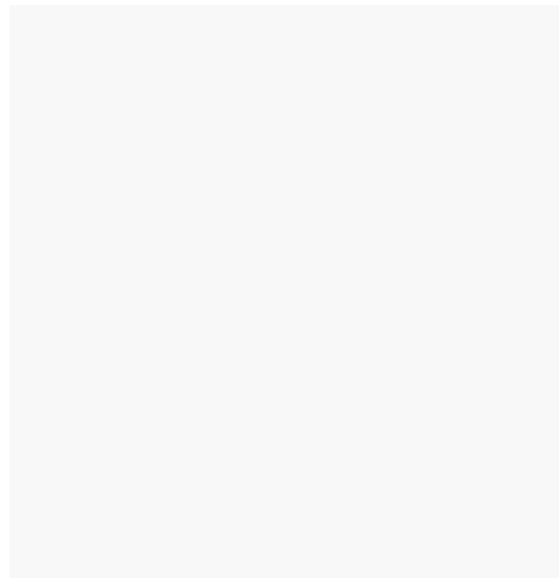
Internal



External

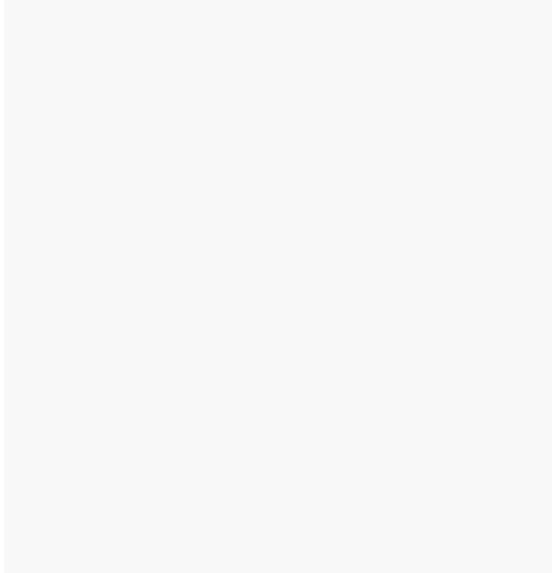


Third-Party

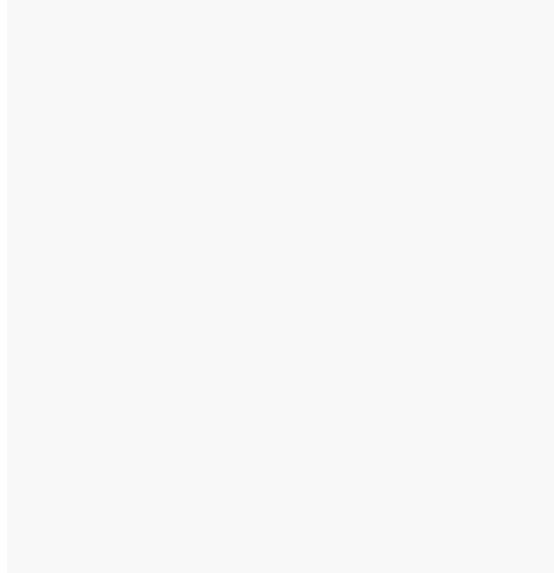


Other

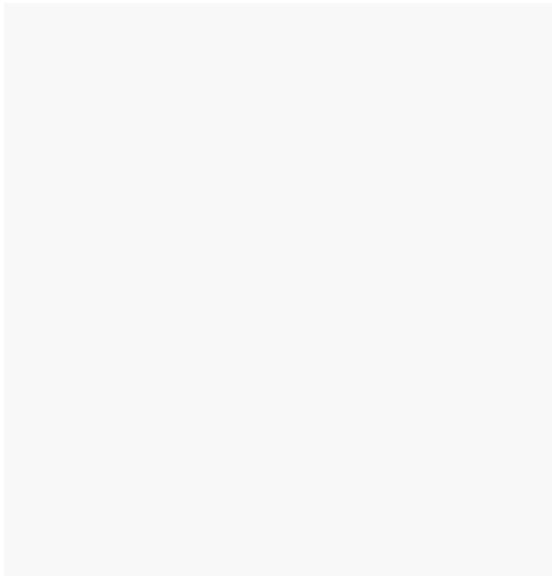
What are the most important pieces of data that impact their experience?



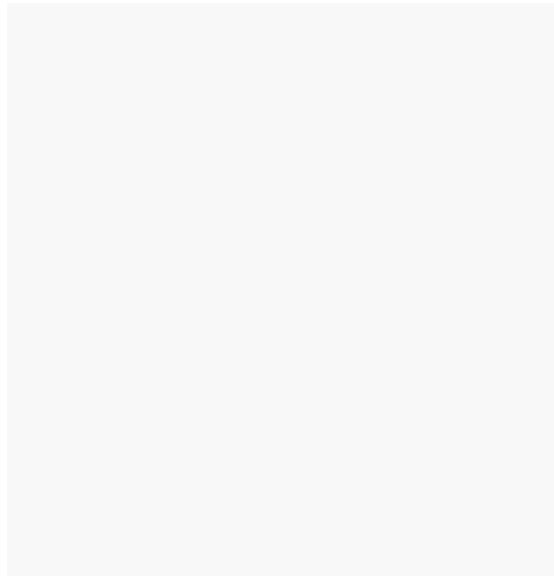
Internal



External



Third-Party



Other

How do you capture that information today?

What are the most meaningful KPI's for your organization?

What are the most important workflows to your organization's success?

01 Marketing

02 Sales

03 Onboarding

04 Account Opening

05 Trading

06 Financial Planning

07 Billing

08 Secondary Services

09 Referrals

10 Annual Meeting

11 Cancellation



What companies have shown you what not to do with their workflows?

What companies or organizations have the best workflows you experience today?

BAD EXPERIENCES	
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VS

GOOD EXPERIENCES	
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## Define Your Critical Path

What is your critical path?

What is blocking your critical path?



## Recommended Solutions

How confident are you in your solutions?

Have you run them through your own unique due diligence process?



## Implement and Iterate

Success isn't static; the best results are the product of iteration, persistence, and time.



## Verify Results

Are all your stakeholders satisfied with the results produced?

If not, what's missing and what's next?



## Elevate

Integration is Subjective; The integrations you need likely underperform your expectations

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Your Data is Your Property

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Your Systems Are Not Static

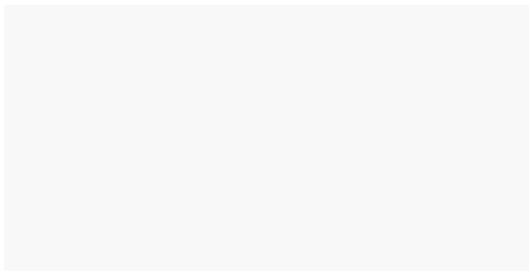
## 01 Connectors



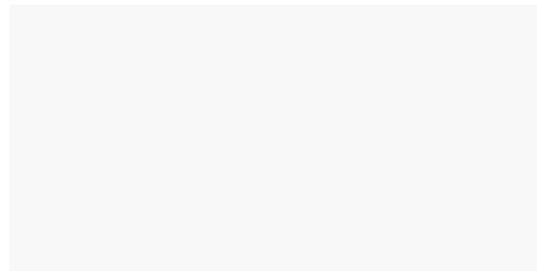
Accounting



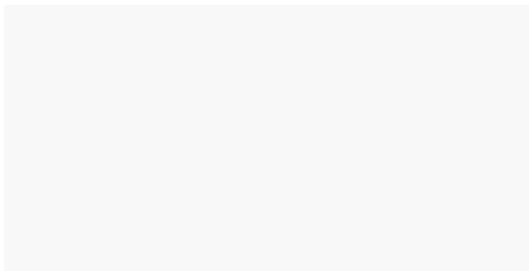
Marketing



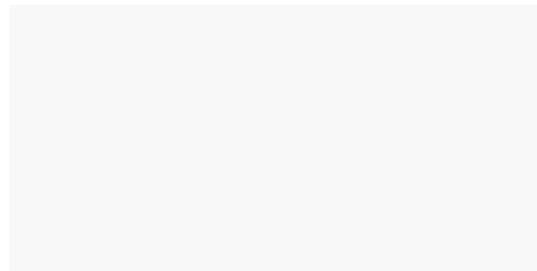
Operations



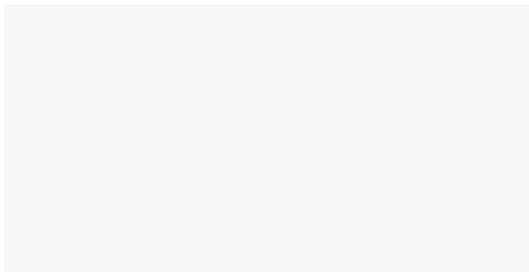
Compliance



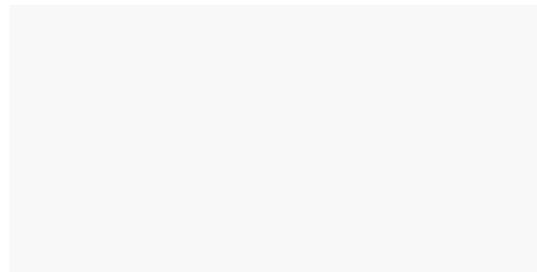
Portfolio Accounting



Fund Accounting



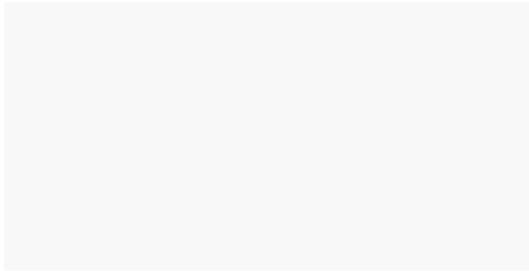
CRM



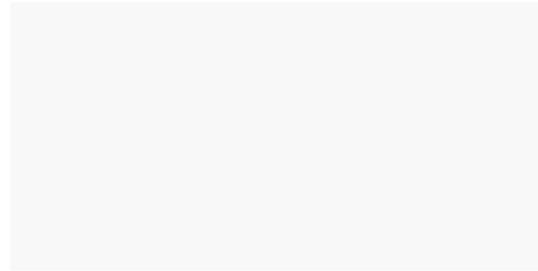
Risk & Analytics

## 02 Data Warehouses, Data Lakes, Data Layers

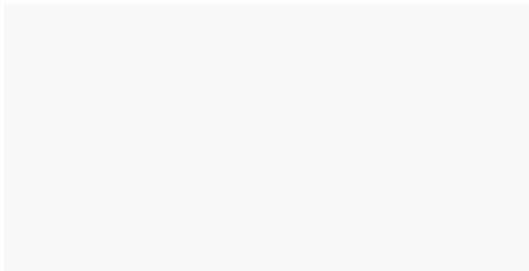
## 03 Data Analytics



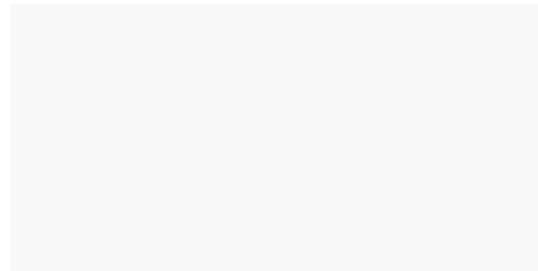
Diverse Data Connections



Real-Time Analysis



Embeddable



Extendable

## 04 Your Applications & Experience

## 05 Reverse ETL

## 01 Services



### Charter

Milemarker Charter is a dedicated strategic consulting program that helps Financial Advisors, Advisor Networks, Platforms, Broker-Dealers, and technology companies gain objective guidance, organizational clarity, and a detailed plan for success.



### Data Engineering

Milemarker's Cloud Engineering team is focused on helping Financial Advisors, Advisor Networks, Platforms, Broker-Dealers, and technology companies augment their teams with trained cloud experts who are able to help you solve your unique data, analytics, and integration problems.

## 02 Solutions



### Connection Suite

We believe in a connected future. At Milemarker, we are committed to connecting your firm with the data you rely on so you can use it for true analysis.

With over 180 connectors and a dedicated team who will build the connections that are missing, Milemarker helps you be more connected than ever before.



### Data Engine

Milemarker helps your firm simplify your data warehousing and cloud computing. On average, Milemarker's data warehousing is 25% of the cost and 7X faster than deploying a solution on your own.



### Analytics Suite

The Milemarker Analytics Suite is built to provide your firm with top-quality analytics and computing with rapid time to market and powerful flexibility.

Connect your data warehouse or load your data directly, Milemarker analytics gives you the power to compute a billion rows of data in real-time with the flexibility to embed what insights you value most anywhere throughout your organization or customer base.



### Platform Management System

One of the unique solutions that Milemarker delivers for firms is the Milemarker Platform Management System. This system deploys on your domain and serves as your central organizational application. It is able to centralize all of your advisors under one roof and can connect to multiple systems - all while normalizing that data in a secure controlled database.