

F/ForwardLane

35% more sales. **650% faster client insights.**

1 data analytics platform to unlock
scalable distribution growth.



Want to really work smarter?

Put our Artificial Intelligence-driven platform to work for your wholesalers. With hyper-personalized client insight signals and next-best-action recommendations that are automated and prioritized for your review every day, you can activate data and grow your distribution like never before.

**Meet the number one data analytics
platform built for asset managers.**

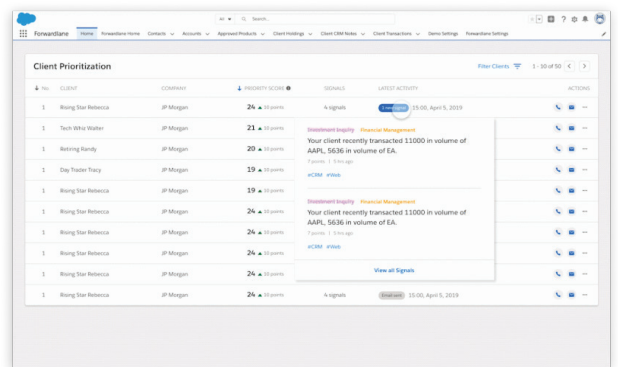
The world has gone digital, but with so much data, it's been difficult and time-consuming to separate real insights from noise.

ForwardLane is leading the industry with patent-pending AI automation that transforms your enterprise, client, and market data into personalized client insights at scale. The benefit: the ability to underscore your funds' value in direct relation to your clients'—and their clients'—specific needs and desires.

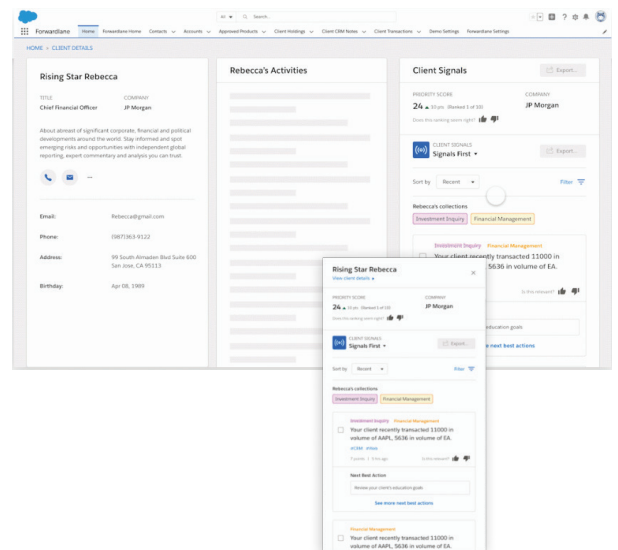
Intelligent. Customized. Automatic. **Who says you can't have it all?**

Your salespeople have better things to do than comb through data looking for reasons to engage clients with your products. With ForwardLane, they can focus on delighting advisors through personalized, value-added interactions that allow you to sell more funds, more often.

We combine market, environmental, enterprise, data packs, and product data with specific client data, including client holdings, transaction patterns, and website visits, to yield actionable insights and competitive opportunities—delivered right in your CRM.



**Sales intelligence has
never been smarter.**



The Value

Personalized client communications, advice, and next-best-action plans based on what's important to advisors—and your business

Prioritized client interactions based on signals such as available investable funds, money movement trends, market movement for top fun positions, and more

Real-time recommendations that allow you to reach out to the right advisors at the right time for the right reasons... insights that increase sales distribution and retention of your funds

The Return

up to **35%**
expanded sales

up to **15%**
more sales capacity

up to **10x**
improvement in sales productivity

**Seamless
Integrations**



 OpenAI

 snowflake

 Microsoft

Trusted by the best

ForwardLane has been recognized as a Wealthtech 100 and AI Fintech 100 firm, and counts large financial institutions like Invesco as trusted clients. ForwardLane is also a strategic partner with two of the most recognizable names in technology, Microsoft and Open AI, and one of only 20 fintechs globally selected by Microsoft for their specialized GTM program for Financial Services.



The other next best action: Schedule a demo.

Relevant product insights. Greater sales efficiency. More opportunities to increase revenue streams. They are all yours with our AI-powered platform for asset managers— with the features and track record only ForwardLane can offer.

See for yourself. **Schedule a demo today.**