

Winners Are Forged in the Fire: Will You Be One of Them?



In today's uncertain times—with COVID-19 causing widespread panic, flailing markets, and terrified investors—there are golden opportunities for those advisors brave enough to seize them.

Investors are waiting for answers. They're looking for confidence, strength, and peace of mind. Can you give them what they need?

That depends on your tech stack.

- **Does it empower you to communicate with your clients anytime, from anywhere?** As questions arise for your clients—about the market, their portfolios, or just general uncertainties—it's important that they know they have an easy way to contact you for answers.
- **Does it include financial planning tools at no additional cost?** Financial planning can be a critical tool during times like these. By establishing your client goals as the catalyst for investment decision making instead of outside factors, you'll help them see the big, long-term picture even if it's tempting to focus on short-term market movement.
- **Does it help you efficiently capitalize on the tax-loss harvesting benefits we're seeing in this market?** Now is the time to prove your value as an advisor, and that goes beyond offering your clients a sense of security and peace of mind. There may be real opportunities to harvest tax losses for your clients, setting them up to offset capital gains in the future.
- **Does it offer the kind of flexibility and user-friendly experience that young investors—who have the most to gain in today's market—demand from their advisors?** Younger investors have the time

horizon to make up returns in a down market. And now, with so much media attention being given to the stock market, they may decide it's time to get involved. But to attract younger investors, you need technology that speaks their language—a client portal and a mobile app they can access anywhere, for instance, as well as dynamic reports and engaging video statements.

Times are changing, which means it's time for change. And when the dust settles, will you emerge as a stronger, more versatile advisor?

To learn more about how technology can help you address your clients' greatest needs and challenges during this volatile time, watch our on-demand webinar: [Is Your Tech COVID-19 Proof?](#)

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