PARTNERSHIP RESOURCE

Strad Pro x fig

Frequently Asked Questions

Everything you need to know about Strad for your practice

GROWTH & WHO IT'S FOR

Q What is Strad?

Strad is a modern Virtual Family & Business Office platform that enables financial advisors to deliver a comprehensive, organized, and secure experience for their clients.
By bringing together financial assets, documents, professional relationships, business interests, and family governance into one platform, Strad helps advisors deepen client relationships while unlocking new growth opportunities.

Strad is a growth platform designed to help advisors differentiate their practice, deepen client relationships, and uncover new business opportunities.

It combines two powerful capabilities:

- **Virtual Family & Business Office Platform:** A secure digital command center that organizes a client's entire financial life, including assets, documents, insurance, business interests, trusted advisors, and multi-generational family relationships. Strad is the only virtual Family office platform that integrates a Business Office & a Family Office inside one secure system, allowing advisors to manage both household wealth and business interests in one place.
- **Rainmaker:** A Mobile Prospecting Tool A proprietary mobile tool that helps advisors uncover new prospect opportunities and expand their client base more efficiently.

Through this partnership with FIG, advisors can now deliver a Family & Business Office experience to everyday households, not just ultra-wealthy families.

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Q What problem does Strad solve?

Advisors today face increasing pressure from every direction:

- AI is transforming wealth management
- Investment management is becoming commoditized
- Differentiating your firm is harder than ever
- Referrals are becoming less frequent
- Client retention requires deeper engagement

Strad helps advisors move beyond portfolio reporting and deliver a truly holistic client experience.

Q How is this different from a traditional client portal?

Traditional portals focus primarily on account aggregation and performance reporting. Strad goes far beyond this, allowing advisors and clients to collaborate around the full picture of wealth, not just investment accounts. Strad serves as a client-facing central command center for the entire household, and all advisors, to organize:

- Financial assets
- Business interests
- Non-financial assets
- Medical
- Documents
- Insurance coverage
- Identity protection
- Lifestyle
- Family governance
- Professional network

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FIGSUPPORT@STRAD.COM

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GROWTH & WHO IT'S FOR

Q How does Strad help me grow my practice?

Strad helps advisors:

- Differentiate their practice during prospect conversations
- Deliver a Family Office experience to everyday households
- Strengthen relationships with business owners and complex families
- Identify new insurance, estate planning, and wealth opportunities
- Collaborate more effectively with a client's professional network
- Modernize the client experience with a secure digital platform

The result is stronger relationships, greater client retention, and increased revenue opportunities.

Q Who is Strad best suited for?

Strad is ideal for advisors who serve mass affluent and high-net-worth households, business owners and entrepreneurs, multi-generational families, and clients with complex financial lives.

Particularly valuable for advisors looking to grow organically by uncovering opportunities within existing client relationships.

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SECURITY & INTEGRATIONS

Q Is Strad secure?

Yes. Strad is **SOC 2 Type 2 compliant** and uses bank-grade encryption, permission-based access controls, and secure document management to protect sensitive client information.

FIG PRICING AND GETTING STARTED

Q What are the FIG partner pricing options?

- Preferential partner pricing
- Dedicated onboarding support
- White-labeled platform
- Early feature access
- FIG-specific training sessions

RIA STARTER
Up to 15 households
$200/month

RIA GROWTH
Up to 250 households
$450/month

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FIG PRICING AND GETTING STARTED

Q How do I get started?

1. Schedule your FIG-exclusive Strad demo
2. Select your white-label branding option
3. Launch your platform using our guided onboarding checklist

STRAD ADVANTAGE

Going Beyond the Transaction

Today's clients expect more than isolated policies or accounts. They want: Transparency, Organization, Security and Collaboration across advisors. Strad helps advisors deliver a modern wealth experience that strengthens client loyalty and drives referrals.

Transparency | Organization | Security | Collaboration

Strengthen client loyalty
Deeper relationships through complete household visibility

Drive more referrals
Differentiate your practice in every competitive situation

Increase firm valuation
Stickier client relationships that compound over time

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