Digital (r)evolution microsite

Technology at Osaic

We're investing in and making enhancements to our technology based on advisor feedback to continuously evolve and deliver better digital experiences.

Where to find digital (r)evolution

URL: https://osaic.com/digital-revolution

From OneHub: Solutions > Technology

	new eQuipt	eQuipt	Salesforce	Client Central	NBS
All registration types offered	✓				✓
New Account Opening – Pershing	✓	✓		✓	✓
New Account Opening - NFS	✓	✓	✓		✓
New Account Opening – Non-brokerage	✓	✓	✓	✓	✓
Account Maintenance			✓	✓	✓
Integrated e-Signature	✓	✓			✓
Streamlined process for e-delivery enrollment	✓	✓			
Integration with WMP	✓	✓	✓	✓	✓
Optimized account funding	✓	✓			✓
Ability to link accounts to one client profile, reducing the need to re-enter client data.	✓	✓	✓	✓	
System validation to greatly reduce NIGOs	✓	✓			✓
Completing the Risk Tolerance Questionnaire (RTQ) only when needed.	✓		✓	✓	✓
Integration with eQuipt client portal	✓	✓			
Status indicators through completion	✓				
Integrated account supervision	✓				
Open multiple accounts at once	Coming in September 2024	✓			(Only with WMP)
Start WMP proposal within new account opening	Coming in September 2024	✓			✓
CRM integration	Coming in October 2024			✓	✓
Integration with the Annuity Submission Platform (ASP)	Coming in October 2024	✓			
Closing client records and account information	Coming in September 2024	✓	✓	✓	✓

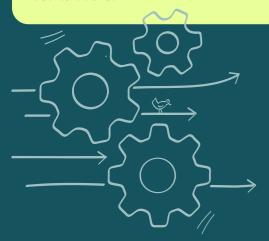# Comparison Chart

Four systems → One (new eQuipt)

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Technology at Osaic

Agile development methodology (n):

An approach to building out technology centered around continuous delivery of updates and enhancements in short and fast iterations.

Testing with a team

Testing internally with teams, home office departments, and sometimes groups of advisors to ensure the system is working to user requirements.

A digital (r)evolution

You can find all the latest releases, updates, and enhancements on the digital (r)evolution site!

Your feedback matters

We take your feedback from advisor councils, OneHub, service lines, engagement teams, conferences, and more to help us understand what needs to be worked on next. So keep it coming!

Priority lists

List of development and enhancements that are prioritized through feedback and discussed with a tactical team.

Technology built to improve products in sprints.

Sprints are a set period of time during which work will be completed and made ready for testing. Sprints run every 3-4 weeks at Osaic!

Benefits of agile methodology

Adaptability

Based on your feedback, our teams can shift to work on the updates and enhancements that you need. This ensures we are focusing on the right things and your highest priorities.

Speed to market

Development is made and delivered in short and rapid "sprints", so we can get things out to you early and often. You don't have to wait long periods for big developments.

Continuous improvement

You will continuously see product enhancements to improve your experience with our systems, never letting your technology grow stale.

New eQuipt Updates

Recent useability updates based on your feedback

Capability	Useability Update
Integration with ASP	Users can now consistently **look up non-brokerage** (direct to sponsor) business within the Annuity Submission Platform (**ASP**), streamlining annuity order entry.
Supervision	Users now have **one place for all account supervision activity**, including supervisors accepting cases and financial professionals responding to supervisors' questions.
Supervision	New eQuipt supervision supports **Trust Under Agreement** for all platforms.
eSignature	**Document Management folders automatically** created at time of document generation, rather than after documents were signed. Users will have a more consistent experience when uploading both **e-signed and wet-signed documents into Document Management.**
Integration with WMP	Users are now able to consistently **launch the new eQuipt directly** from the proposal tool in WMP.
Registration	**Non-Brokerage Estate Inherited Roth IRAs** are now fully supported.
Search	Ability to **search by account number** in eQuipt (New) added as an additional way to locate clients and accounts.
Client Definition	**Client definitions** are being updated to avoid duplicate clients base on Last Name/First Name spelling mismatch.

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Resources

	eQuipt (new)	OneHub	Wealth Management Platform (WMP)
Digital (r)evolution site	• www.osaic.com/digital-revolution • OneHub → Solutions tab → Technology		
Tech Release Notes	• Weekly updates on releases *(coming soon)* **Where to find them** • OneHub → Solutions → Technology • Digital (r)evolution site → Tech Talk • Weekly digital update email from Ed Obuchowski		
Resources	• **Comparison Charts** (digital revolution site → eQuipt → Resources) • **Frequently Asked Questions** (digital revolution site → eQuipt → Resources) • **Training** ((digital revolution site → eQuipt → Resources – or – Learning Corner)	• **Getting Started Guide** (digital revolution site → OneHub → Resources)	**OneHub Page** Solutions > Serve Your Clients > Advisory Solutions > Wealth Management Platform **Meet WMP - Asset Acceleration** • https://accelerate.osaic.com/wmp
Support	**New eQuipt support** • 1-800-821-5100, Fast Track 7-2. **Meet an eQuipt consultant** *(coming soon)* • Schedule time with a consultant will soon be available on eQuipt page of digital revolution site.	**Support Center** • OneHub → Support → Open a Support Center Request	**Advisory Business / Platform Questions** **Advisory Consulting** ia@osaic.com 877-773-8130 **WMP Technology / Billing Questions** **IA Operations** 800-551-5616
Feedback	Feedback link on • digital revolution site → eQuipt	On OneHub, look for the **Question Mark (?)** icon on the bottom right of your home page.	Advisory Consulting ia@osaic.com 877-773-8130