



- Data from the Advisory M&A perspective
- **SATURN DATA ENGINE** - *market leading advisory insights*
  - **Data Driven → Firm Profitability**
  - **Data Driven → Business Scorecard**
  - **Data Driven → Growth Opportunities**
  - **Data Driven → Impact on investor outcomes from SMA/MDA's**

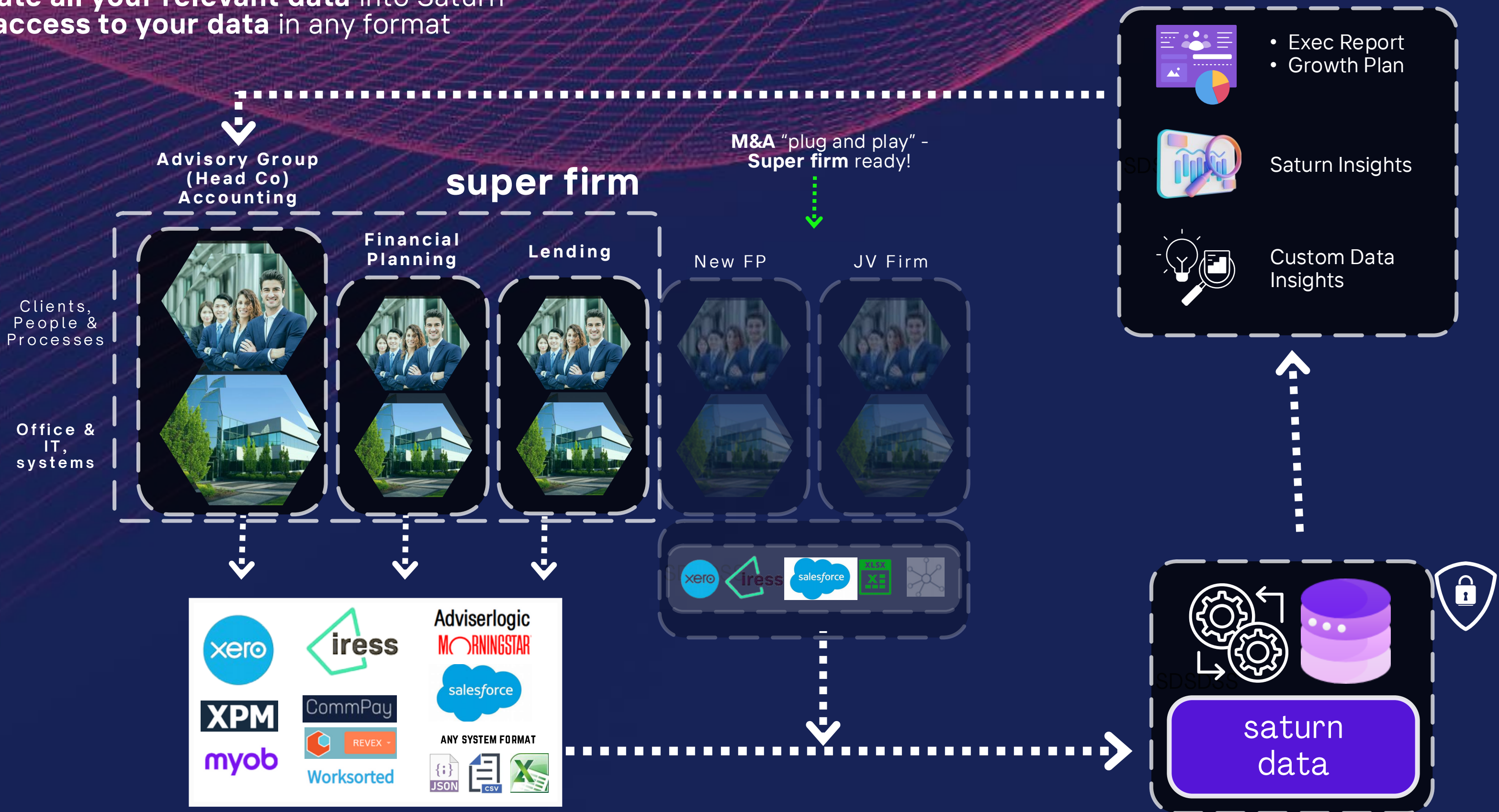


# SATURN DATA - ALL FIRMS & SYSTEMS



## how it works!

- we **consolidate all your relevant data** into Saturn
- we **provide access to your data** in any format





# SATURN ADVISORY INSIGHTS - ONLINE PORTAL “MARKET LEADING”



Market-leading performance insights for your business. Access to all your data (Single source of truth)  
Top-to-bottom visibility (firm, team, clients, activity) Automated ongoing monitoring—weekly or monthly

- AUTOMATED - SINGLE SOURCE OF TRUTH**
- CONSOLIDATED DATA - ALL SYSTEMS**
- SECURE ACCESS**
- PROFITABILITY & PERFORMANCE**
  - FIRM
  - TEAM & POD \*\*
  - ADVISERS
  - CLIENTS
- UTILIZATION - FRONT & BACK OFFICE**
- CLIENTS WON/LOST (RETENTION)**
- BENCHMARKING - FIRMS, TEAMS, CLIENTS, PRICING**
- BACK OFFICE ACTIVITY - WORKFLOW, FILENOTES**
- DATA QUALITY & REVENUE LEAKAGE**
- M&A INSIGHTS - VALUATION\* , RISKY REVENUE**

## ONLINE PORTAL



### FIRM PERFORMANCE



### TEAM/POD PERFORMANCE



### ADVISER PERFORMANCE



### CLIENT GROWTH/RETENTION



### DATA QUALITY & SCORING



### M&A INSIGHTS & RISKY REVENUE





# BUSINESS SCORECARD - KEY GROWTH LEVERS



*“Our approach is to understand where you are now and create a tailored growth roadmap with you — identifying key levers for growth and improvement.  
We help and support implementation while monitoring success!”*

## GROWTH ROADMAP

	BEFORE	Q1	Q2	Q3	Q4	AFTER
Strategy & Vision	●					●
MIS & Performance Insights	●					●
People	●					●
Client Services & Pricing	●					●
Client Growth & Retention	●					●
AI Advice & Workflows	●					●
Outsourcing	●					●
Sucession	●					●
Coaching, Training & PD	●					●
Data Quality & Governance	●					●
Technology Ecosystems	●					●
Cyber Security	●					●
IT & MSP	●					●



## SOLUTIONS - GROWTH & IMPROVEMENT



PRACTICE MANAGEMENT



M&A - GET SELL READY



OUTSOURCING



AI ADVICE & OPTIMISATIONS



CLIENT PRICING



CLIENT GROWTH & RETENTION



DATA QUALITY & REVENUE  
LEAKAGE



SATURN ADVISORY INSIGHTS  
MARKET LEADING



SMA/MDA SNAPSHOT & TRANSITION



CYBER RISK PROFILE





## DOUBLE IN SIZE

### GROWTH LEVERS

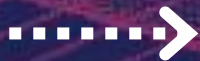
#### Strategy, People & Culture

#### Revenue Growth

- Organic **5%+**
- Aquisition **\$1 Mil +**
- Pricing **5%-25%**
- Move to SMA/MDAs **10%+**
- JV & Partners **5%+**

#### COST Optimizations

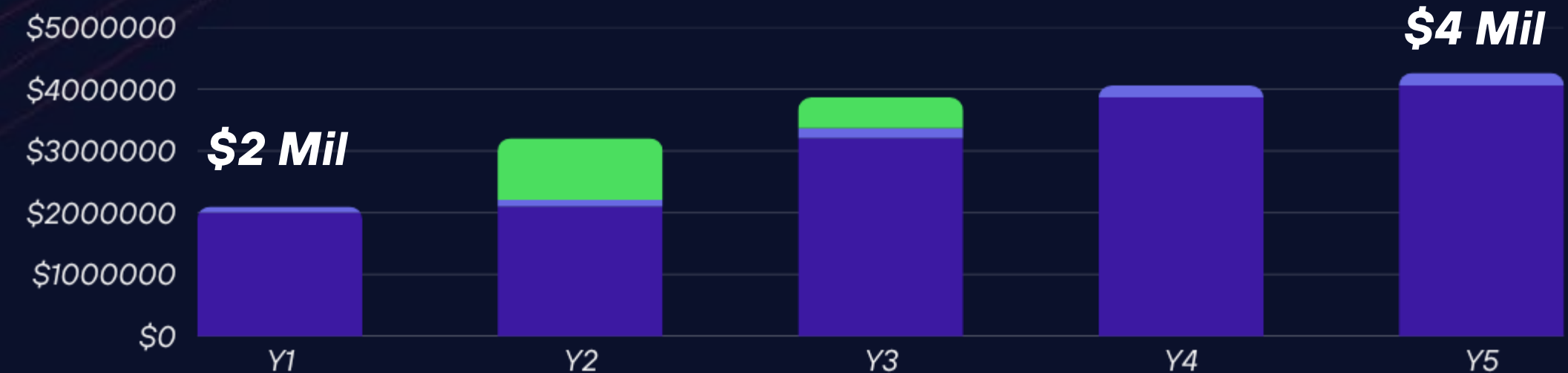
- Leverage Capacity **20%+**
- AI **25%+**
- Outsourcing **30%+**
- Workflows **25%+**
- Monitor Cost To Serve
- Revenue Leakage **1%-10%+**
- Data Quality **1%-10%+**
- Tech Stack



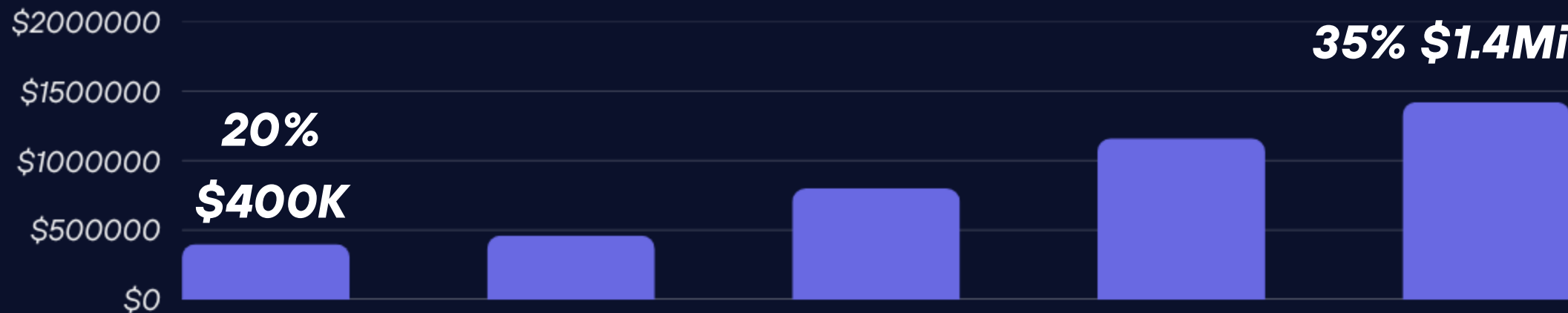
### Business Projects



### GROWTH ROADMAP



### REVENUE GROWTH



### EBITDA GROWTH



# PORTFOLIO RESEARCH - OPTIMISE INVESTOR OUTCOMES



## USING SMAS & MDAS PROGRAMS FOR INVESTMENT PORTFOLIOS



### EXISTING CLIENT INVESTMENTS

- Goals & Outcomes
- Portfolio Data

### DEMONSTRATE

- Improved outcomes with SMA/ MDA
- Meet BID
- Prove the value of your Wealth Management service

### ADVICE FIRM



### RESEARCH



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