



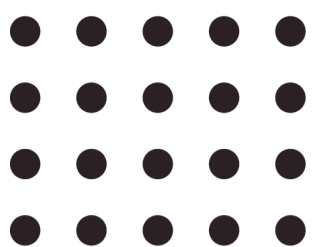
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Insights from the 2024 RIA Schwab Benchmarking Study

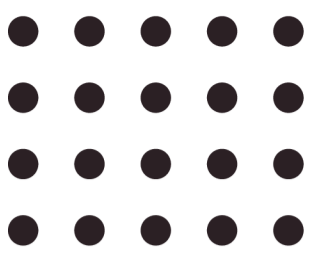
As an RIA, scaling client acquisition, enhancing engagement, and optimizing operations are key to staying competitive in today's market.





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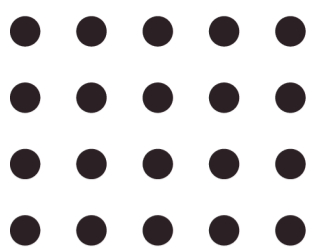
Top-performing RIAs that implement structured and scalable client acquisition processes achieve significantly better growth metrics compared to those that don't.



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2X

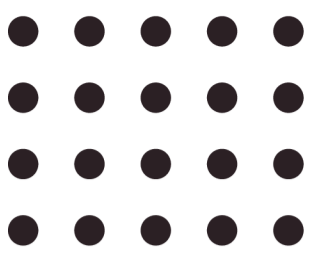
Twice the annual revenue
growth.



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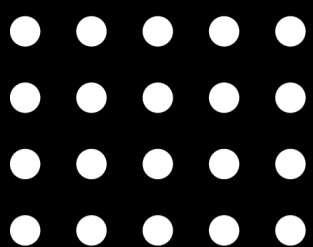
3X

Three times the asset growth
from new clients compared
to their peers.



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These firms excel by using automation and analytics to drive client acquisition, boost conversion rates, and enhance operational efficiency, giving them a substantial competitive edge in the market



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DISCOVER HOW AI CAN
TRANSFORM YOUR RIA

**The AI Platform that
Systematizes Client
Acquisition for Sustainable
Growth**

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