1. Client objectives

You can meet a wide range of clients' needs with Engage's broad data which is updated daily by our experts, ensuring you'll always have information you can rely on.

Efficiently service a wide range of clients:

- Grow wealth
- Withdraw an income
- Savings
- Family protection

Save time and ensure consistent advice through:

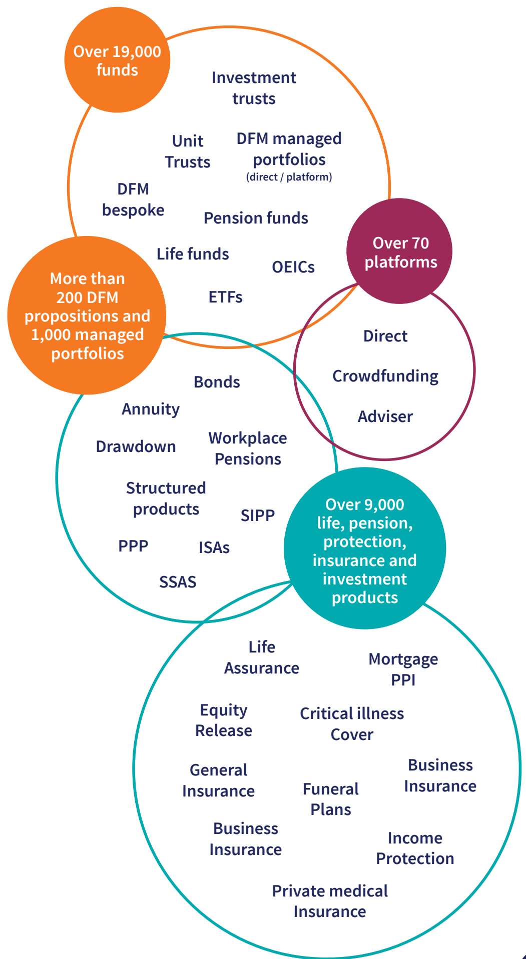
Panels for approved provider lists

Creating **model portfolios**

Templates to save frequent searches

2. Research

Unique three-way dynamic research allows the selection of compatible funds, platforms and products.



3. Analyse

Filter, sort, rank and analyse over 14,000 data points to find the best options for your clients.

Filter

Remove unsuitable options to create your shortlist

Sort

Tell Engage to bring the best of the shortlist to the top of the search results

Rank

Compare each option's strengths and weaknesses to find the best one

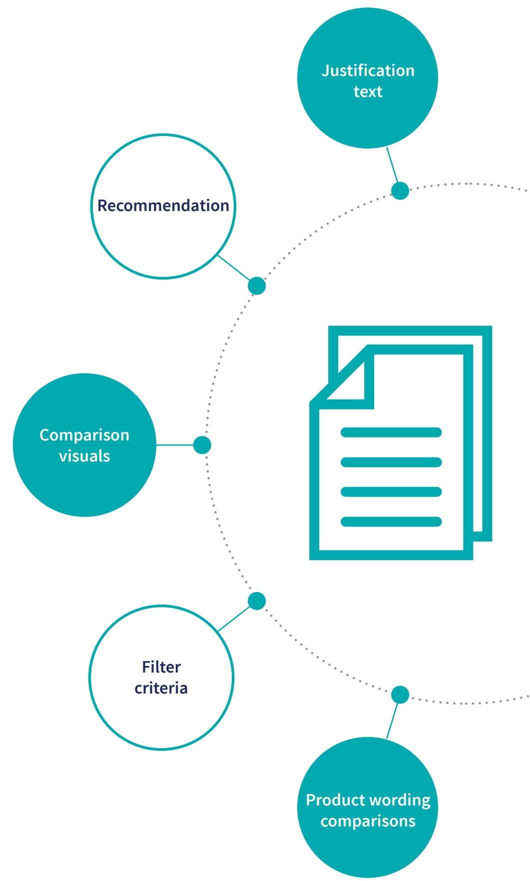
Defaqto Ratings help you make better informed recommendations:

defaqto DIAMOND RATINGS | defaqto STAR RATINGS | defaqto SERVICE RATINGS GOLD

Recommend

4. Report

Engage has followed every step to automatically produce an audit trail and a fully editable, detailed report. This includes outputs from the data visualisation tools and a client summary.



20 mins