TACTIVE
Joseph Gissy
Founder and CEO

Tactive was created by independent financial advisors to serve advisors.

We understand the frustration advisors can experience when trying to onboard clients who use a variety of custodians. It can be time-consuming, disjointed, and not efficient when trying to scale their businesses.

We also believe that the buy-and-hold modern portfolio theory isn't "modern." We want to give access to automated, active investment strategies while focusing on minimizing drawdown.

With help from a talented team who believed in these ideas, Tactive was born in 2021.

A one-stop platform to support front and back-office functionality while helping automate the onboarding and trading process, Tactive was designed for the future.

The team is proud that Tactive's platform provides the independent advisory space with a full-service suite of products and services to help W2 advisors, IARs, and RIAs better serve their clients.

TACTIVE™

Tactive • 7400 Baymeadows Way, Ste 300, Jacksonville, FL 32256
tactivewealth.com

Founded in 2021, Strategy Marketplace dba **Tactive** is disrupting the current financial advisory space and ushering in the new evolution in WealthTech with its innovative product suite and award-winning TAMP.

Tactive has created a seamless platform to develop and nurture clients with an advisory retail practice. Through this retail practice an advisor can prospect new clients efficiently, onboard new clients with an end-to-end solution, and then gain key insights as to which products and services the advisor can work with in order to help build a client's financial plan.

RIAs, IARs and breakaway reps benefit from working with Tactive through equity participation, bonus potential, product marketplace access, marketing support, and operational efficiencies. Tactive's workspace offers access to assess an advisor's total book of business through analytics and performance metrics.

Manage client investments on your time with guided resources, custom solutions and retirement planning.

Tactive has three primary value propositions:

1. True Partner for Growth: Tactive uses its technical and digital marketing leverage to support W2 advisors, IARs and RIAs. Tactive connects retail clients with advisors to help scale their practice. Tactive also has a partner-centric recruiting and growth model to help financial advisors earn additional revenue as well as participate in an equity and cash reserve plan.

2. Next Evolution WealthTech: A true hybrid WealthTech platform, Tactive provides a proprietary advisory workstation to help advisors manage their business and connect with their clients. Enhanced data and analytical tools provide market insight and introduction opportunities for its innovative product suite. Tactive's workstation allows advisors to build customized portfolios with its strategy marketplace.

3. Innovative Product Suite: Tactive looks beyond typical investment strategies to provide clients with diverse tools to reach their financial goals. It offers a range of investments, from blended portfolios that focus on limiting drawdown to alternative assets and cryptocurrencies.

New business contact:
Rick Dwyer
Phone: (888) 318-0640
E-mail: rick.dwyer@tactivewealth.com

Brand of program: Tactive
Type of program: Managed Account Solutions, Model Manager, Risk Managed Portfolios, Section 3(38) Fiduciary Manager, SMA, Strategist, TAMP, Third-Party SMA Access, Third-Party Sub Advisors
Total assets in program: $350 million
Assets under management: $130 million
Year program began: 2021
Managers on platform vetted: 5
Managers GIPS® compliant: 3
Type of product available: ESG, ETF & MF SMAs, ETFs, Model based Account Managers, Multi-manager strategists, ETF Models, Fixed Income, 403(b), Retirement plan options, 401K, Fiduciary Solutions, Goal-based Strategies
Program uses platform to track reporting of client holdings: Multiple: Black Diamond, internal and custodial platforms
Program is compatible for: Advisors looking for active, tactical and quantitative financial strategies as well as a Tactical Auto Advisory platform that can help scale their business and augment their current tech stack. Those advisors looking to use a tactical strategy with their higher net worth clients wanting to protect their portfolios during bear markets and advisors looking to kick their practice up with a program that is easy to onboard clients.

Program optimizes for tax and trading efficiency: Yes
Sleeve-level reporting: Yes
Program links to a trade execution or order management system: Yes
Program links to a trust accounting system: No
Private branding or white labeling possible: Yes
Proposal generator: No
Generates investment policy statements: No
Asset allocation methodologies: Asset Class, Sector
Rebalancing: Yes
Aggregation of held-away accounts: Yes
Custodians supported: Interactive Brokers, Nationwide, TD Ameritrade, Charles Schwab, Goldman Sachs
Client goals: Wealth Accumulation, Long term growth, Retirement Income, Income
Marketing support offered: Brochures, Client Approved Materials, Client Functions, Client Materials, Client Proposals, Custom Lead Generation, Digital, Emails, Fact Sheets, Hands On Training, Investment Strategists Relationships, Market Commentary, Market Updates, Monte Carlo Simulations, Ongoing Coaching, Ongoing Updates, Online Resources, Performance Files, Portfolio Management Access, Practice Management, Public Relations, Quarterly Newsletters, Sales Ideas, Sales Professional Engagement, Seminar Programs, Social Media, Videos, Wholesaling Team