



COMPANY INNOVATION

RIGHTCAPITAL

Financial Planning Software

Data transfer

Cleaner/Faster User Interface

Cash Flow Modeling

Integrated Budget Module

Client Access





NCM360

Financial Organization Dashboard

Proprietary

Document Storage

Ongoing on-demand enhancements as needed

Mobile Access

Security

Knack/AWS Platform



PLANNING CENTER

Financial Planning Research Library

Over 400 articles covering 31 categories

FINRA compliant

Topics Revised Regularly

Searchable

New content added regularly

Available on NCM Website

ROWLING & ASSOCIATES

Back Office Trading & Rebalancing

Based in San Diego

Long-time and highly successful CPA/Advisor

Original developer of TRX Software

Ongoing, close relationship with Morningstar

Weekly meetings with NCM



DPL FINANCIAL PARTNERS

Insurance Advisory Network

Life Insurance

Long-Term Care Insurance

Annuities

Low-cost no-commission solutions

Objective insurance advisory



GUIDELINE

401k Provider

Low-cost platform

NCM advised & managed

Vanguard & DFA funds

Easy administration

High-quality mobile & desktop user dashboard

STRATA TRUST

Self-directed IRAs

Experienced Trust Administrator

Private Real Estate

Private Investments

Private Loans

NCM Accounts Authorization

Reasonable Platform Fees





CYBERSECURITY & ADMINISTRATIVE

Cybersecurity

Two-step authentication

Password Manager

Box

Virus Checker

Administrative

Fidelity Trusted Contact

Fidelity eSignature capability