

Personal Financial Index® Driving Business Growth

OMYEN's **Personal Financial Index® (PFI)** technology allows individuals and families to quickly benchmark their personal financial health, identify the financial gaps, and to get the **PFI Score**. This technology offers a number of benefits to financial service providers. They include:

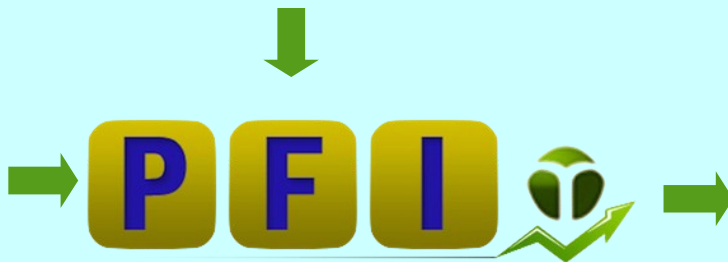
- *Efficient acquisition of new clients*
- *Growth in the 'share of wallet' from existing clients*
- *Complete client profile for cross selling opportunities*
- *Improved Compliance (Know your customer)*



Prospective Clients



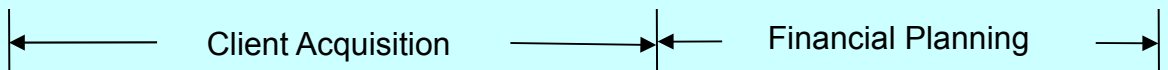
Financial Professional



Personal Financial Index®



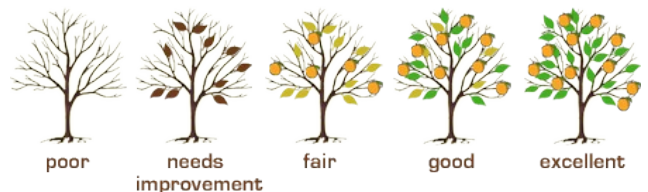
Financial Professional



Features:

- Prospect – financial professional collaboration
- Advanced alert capabilities
- Multiple entry points for cross selling
- Reduced data entry for planning
- Branding and customization allowed

Visual & Numerical Results, and Analysis



Incorporate PFI in your practice

- Customized branding of the PFI instance/website
- Customized call to action at the end of the PFI exercise
- Interfaces with downstream applications e.g. CRM and Financial Planning
- Practice resources from OMYEN on seminars and other sales strategies
- Reporting on prospects and other administrative functions

OMYEN technology

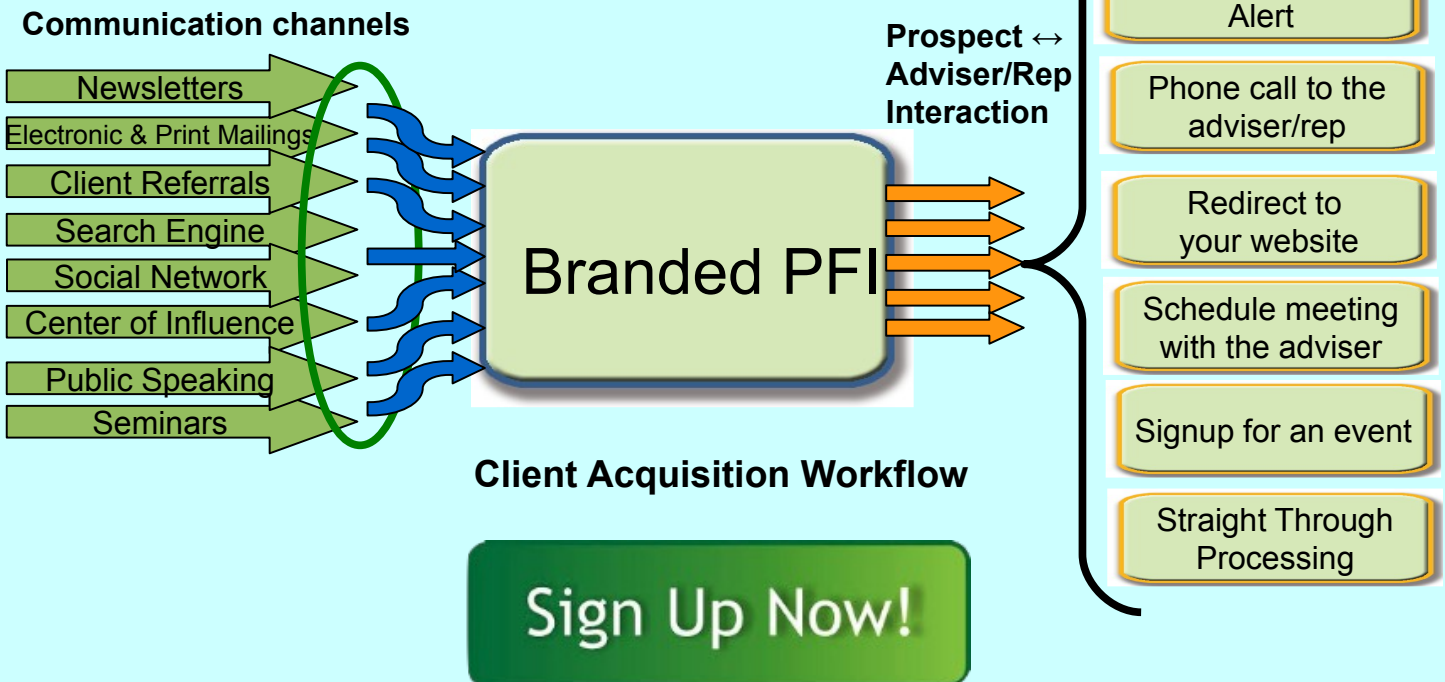
- Accessible through most computing devices including an iPad
- Open architecture offering easier integration
- Secured encrypted communication
- Privacy protected
- FINRA reviewed

Customized Call To Action



BEST Advisors
The name you can trust!
Learn more about us

234 Prospect Street, Suite 100
 Beverly Hills, CA 90210
 111-222-3333 (Direct)
 800-800-8888 (Toll Free)



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