





# Quick View

- BSM and Avenue Robo-4-Advisors work together as an informal bundle. If you use Avenue, you get BSM at no charge; if you reach the annual \$6,000 BSM maximum, Avenue is included.
- With BSM's extensive and integrated functions, you can grow your way into using BSM at just \$50 per client; once you reach \$6,000 (120 clients) per year, your costs are capped. And, this maximum is for your entire location, regardless of the number of users, causing your firm's software costs per professional to plummet.
- Avenue allows you to serve other markets such as low-asset or fee-sensitive clients; this provides your firm with additional revenues that you completely control.
- Providing you with No Compromises Functionality™, reduced costs, and increased revenues brings you higher profit margins and a brighter future.

Subscription Type		
Main Functions	Simple to Complex Plans Needs/Goals Planning Portfolio Design Investment Analysis IPS Generation Portfolio Rebalancing	Your Own RoboAdvisor You Set the AUM Fees All Revenue is Yours Your Content Your Models Your Accounts
Annual Per Client	\$50 per Client	NA
Annual Advisor Max	\$6,000/Yr. (per Physical Location) (No Charge with Avenue)	\$6,000/Yr. (No Charge with BSM Max)
Optional Charges (Cost Pass Through)	Account Aggregation Databases: Hedge Funds and SMA Variable Annuities	None
<b>Common Facilities for Either Subscription</b>		
Open-Content Architecture Page-Template Design Report/Proposal System	Quick Reports/Proposals Powerful Graphics Management Dashboard	Advise Content by Page Auto Trading/Execution Compliance Tracking