

Everything You Need in One Platform

One integrated platform to design your program, activate your network, uncover intro paths, expand with advisors, and optimize results.

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Program Design

Set the foundation for a successful advisor-led growth program.

- ✓ Company Profile
- ✓ Company Intelligence
- ✓ Rewards Plan
- ✓ Toolkit & Documents
- ✓ Admin Users
- ✓ Program Settings
- ✓ Branding & Messaging
- ✓ User Management
- ✓ Permissions

2



Grow Your Network

Activate internal and external participants to surface valuable relationships.

- ✓ Invite Team Members
- ✓ Create Target Members List
- ✓ Drive LinkedIn Data Uploads
- ✓ Promote Adding Companies
- ✓ Invite Company Network
- ✓ Review Referrals
- ✓ Follow-Up On Key Invites
- ✓ Expand Team Participation
- ✓ Expand Company Network

3



Intro Path Discovery

Find and prioritize the strongest introduction paths into your target accounts.

- ✓ Add Target Accounts
- ✓ Prioritize Target Accounts
- ✓ Explore Intro Paths
- ✓ Review Relationship Details
- ✓ Review Suggested Intros
- ✓ Share Insights
- ✓ Approve Intro Matches

4



Optimize Intros

Prepare, coordinate, and track introductions through meetings and opportunities.

- ✓ Share Preparation Insights
- ✓ Share Messaging & Pitch
- ✓ Introductions Follow Up
- ✓ Introduction Collaboration
- ✓ Introduction Tracking
- ✓ Meeting Tracking
- ✓ Opportunity Status Tracking

5



Network Expansion

Extend your reach with the right advisors and tailored advisor programs.

PLATFORM

- ✓ Advisor Profiles
- ✓ Client in TrueLynk Portfolio

TRUELYNK SERVICES

- ✓ TrueLynk Advisor Matching
- ✓ Active Advisor Recruiting
- ✓ Recruitment Campaigns
- ✓ Dedicated Advisor Programs

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Manage & Engage

Keep members engaged and continuously improve program performance.

- ✓ Rewards Management
- ✓ Activation & KAH Campaigns
- ✓ Notifications
- ✓ Member Engagement
- ✓ Advisor Engagement
- ✓ Results Tracking
- ✓ Dashboard
- ✓ Program Optimization