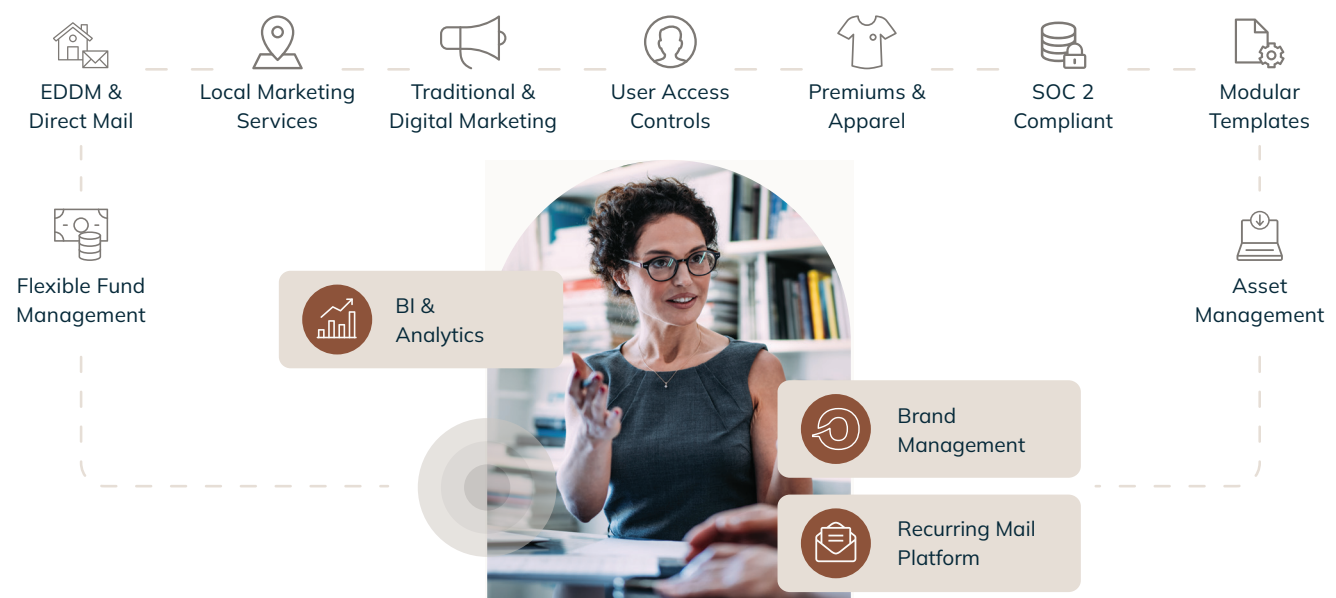


# OneTouchPoint for Financial Advisors

Streamline marketing materials and client communications through our secure technology platform and suite of solutions. Our flexible technology, solutions and team of experts bring marketing capabilities, brand management and production efficiencies together to save you team while reaching your business goals.

## Elevate your client marketing and communications.

- ✓ Provide access to a pre-approved asset library to access, order and localize materials with modular templates.
- ✓ Empower financial advisors with access to local, prescriptive digital & traditional marketing campaigns they can easily execute on.
- ✓ Leverage a single source partner, offering commercial print, on-demand printing, kitting, mailing, warehousing and distribution facilities under one roof.
- ✓ Monitor your business with transparent reporting packages and digital campaign dashboards.
- ✓ Ensure brand consistency with access to pre-approved marketing programs, materials, and more.
- ✓ Control and manage local budgets & MDF funds —set budgets at any level.



# Harness the power of OneTouchPoint



99.9% correct  
order rates

We get it right the first time.  
And with nationwide locations &  
global network of partners—we've  
got you covered



12% YOY average  
spend reduction

Leverage our technology platform,  
streamlined processes, and  
know-how to lower direct material &  
productivity costs.



3-5 days increased  
speed to market

Our user-friendly platform lead to  
increased adoption of self-service  
orders users, getting materials to  
market, faster and on brand.



500% increase in  
page views

A national accounting firm leveraged  
our suite of marketing services  
including campaign management,  
social, digital and retargeting ads.

## A Certified Partner



SOC 2  
Compliant



FSC  
Certified

To learn more go to [1touchpoint.com](https://1touchpoint.com)  
call 800-332-2348  
or email [info@1touchpoint.com](mailto:info@1touchpoint.com)

1TP-IO-1009 (Rev 4/25)