

STRAD PRO DIFFERENTIATE WITH DEMONSTRATION



Rise Above the Ordinary

Tired of blending in with every other financial professional? Strad gives you the power to stand out.

Show, Don't Just Tell

Many financial professionals speak about their processes, Strad lets you visually guide clients through life and wealth events.

Collaborate & Communicate

Built-in triggers and tasks empower:

- Eliminate ambiguity about your process and differentiate from competition.
- Seamless teamwork within your firm.
- Effective collaboration with external professionals in your client's circle.

Life & Wealth Event Workflows



You become the financial quarterback.



Comprehensive roadmaps for both expected and unforeseen events.



Detailed step-by-step actions, bringing clarity and assurance.



Real-time collaboration across your team and your client's other financial professionals.

Why Strad?

- Be visibly distinct in a saturated market.
- Offer clients tangible, understandable insights into what you do for them.
- Enhance trust through clear, demonstrable strategies.

GET IN TOUCH

SCAN TO
SEE MORE

