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Folio Introduces Another Breakthrough Technology Tool For Advisors

Advisor Dashboard, a web-based practice management and productivity tool, streamlines advisors' day-to-day operations and increases efficiencies and account servicing with a customizable, holistic business view

McLean, VA – January 28 , 2015 – Folio Institutional, a division of Foliofn Investments, Inc., announced today the launch of its Advisor Dashboard, a web-based productivity tool that helps advisors and home office administrators manage their businesses more quickly and efficiently. An innovative approach to a classic tool, Advisor Dashboard offers more than 60 customizable widgets, offers advisors actionable insights to help them better understand and react to the health of their business, reduce errors and increase client satisfaction. It is now available to all advisors using the Folio Institutional platform.

“Financial advisors are always on the lookout for the latest tools to help them grow their businesses and improve client service,” said Greg Vigrass President and CEO of Folio Intuition. “With the Folio Advisor Dashboard, we are providing advisors and home office administrators using our platform a fully-customizable experience that streamlines their daily management procedures and allows them to take a more holistic, efficient approach to their practices.”

Seamlessly integrating into the Folio Advisor® brokerage platform, Advisor Dashboard is a one-stop portal that consolidates information through Folio’s unique collection of widgets. Advisors can customize the Dashboard’s layout and even create multiple dashboards based on what they feel is most essential to their day-to-day workflow.

The Advisor Dashboard is an efficient entry point to multiple sources of information about client accounts, holdings, balances, account restrictions and more. It was designed with an eye to reducing the routine for advisors, while providing another level of service effectiveness through the Folio platform.

For more information on Folio Institutional and the Advisor Dashboard, please visit www.folioinstitutional.com

About Folio Institutional

Folio Institutional, a division of FOLIO*fn* Investments, Inc., is an innovative investment solutions company offering an integrated brokerage and technology platform, featuring a patented, state-of-the-art Folio trading capability.

FOLIO*fn* Investments, Inc., has been a self-clearing broker-dealer since 2001. Today, it provides custody and brokerage services for billions of dollars of investor assets, and thousands of financial professionals and institutions.

For further information please visit www.folioinstitutional.com and follow @FolioAdvisor and #dashboardrocks on Twitter