

State Farm Selects intelliflo to Give Agents a New, Easy-to-Use Digital Wealth Platform to Expand Financial Advice Services

ATLANTA – July 21, 2021: When State Farm looked to the future needs of its customers, helping more people achieve their financial goals was paramount. Offering a better investing experience is critical to deepening the relationship State Farm agents have with customers, as well as expanding the scope of investment products and services available to State Farm customers.

State Farm recently selected intelliflo as a partner to deliver a compelling digital investment experience for both customers and agents. This includes migrating State Farm's brokerage business onto the intelliflo platform for easier access by agents, while at the same time providing customer self-service tools. The platform will also deliver efficiencies for agents achieved through data-driven integrations and automated digital workflows.

On a single platform powered by intelliflo, State Farm agents will be able to recommend products for both brokerage and advisory accounts using intelliflo risk mapping tools and goal-based planning capabilities to understand customers' financial needs and preferences.

intelliflo is able to provide a comprehensive digital wealth platform for State Farm as the company was recently formed from five established financial technology companies owned by Invesco (NYSE: IVZ), spanning financial planning, practice management, portfolio management solutions, digital advisory, and managed services.

"Earning State Farm's business is significant, but not just because of its size," said Jennifer Valdez, president, Americas for intelliflo. "We saw the opportunity to be a close partner with State Farm to fully transform the agent and customer experience."

"When we set out to evaluate what our future state needed to be for our agents and customers, we found a great partner in intelliflo," said Sarah Mineau, vice president, Operations – State Farm Investment Planning Services. "Their expertise in delivering digital financial services solutions resulted in a partnership that is going to positively transform how our agents serve customer needs in more ways than ever before."

Continued Valdez, "intelliflo is able to offer the complete package for our customers, from enterprises like State Farm to banks and independent advisors. Our focus is to be a true partner for our customers, to help them achieve their business goals with a full suite of services that provide what they need to succeed."

About intelliflo

intelliflo widens access to financial advice through leading technology which powers the financial advisory experience. We use open software architectures combined with unmatched industry experience to simplify a complex digital landscape to help advisors compete and grow. Our solutions support over 30,000 financial advisors worldwide, representing over three million end-investors, with more than \$1 trillion assets serviced across intelliflo.



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