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WHO WE ARE

Myriad Advisor Solutions began in a three-person office with a bold mission: to make the process easier and simplify success for business owners. Today, 15 years later, we've empowered 10,000+ independent financial advisors nationwide—and counting.

We're more than a service provider. We're your behind-the-scenes partner, delivering the structure, systems, and support you need to grow with confidence while staying focused on what matters most.

WHY MYRIAD

- ✓ Specialized in regulated industries
- ✓ Dedicated, U.S.-based support team
- ✓ A single point of contact to coordinate every aspect of your business

HOW WE HELP

Whether you're launching, scaling, or streamlining, we provide the roadmap and the right experts to move your business forward with clarity and confidence.

WE HANDLE IT ALL



Business Services



Compliance



Cyber Security



Human Resources



Marketing



Technology



Transitions



Unified Communications

BUILT WITH PURPOSE. RECOGNIZED FOR IMPACT.

Our work has earned recognition from respected organizations across technology, business, and leadership.

Led by CEO Danielle White, Myriad's growth and innovation continue to make waves in the industry.

2025

DANIELLE WHITE

Forum Chair and President Elect
Entrepreneur Organization (EO)

2024

MYRIAD ADVISOR SOLUTIONS

Midsize Technology Company Finalist
Technology Association of Iowa

DANIELLE WHITE

Young Alumni Achievement Award
Drake University

2023

MYRIAD ADVISOR SOLUTIONS

Large Business of the Year
Waukeech Chamber

DANIELLE WHITE

CEO of the Year Finalist
Technology Association of Iowa

Experience peace of mind.

We anticipate challenges before they arise and build systems that keep your business running smoothly.

Our team works quietly in the background, solving problems you don't see, and handling details you shouldn't have to worry about.

We empower you to focus on your clients and growth, knowing the foundation of your business is solid and secure.

That's the difference in our approach—and why our clients rely on us year after year.

END-TO-END TECHNOLOGY. BUILT FOR GROWTH & SUSTAINABILITY.

From cybersecurity and cloud infrastructure to everyday helpdesk support, Myriad delivers secure, scalable technology solutions tailored to independent financial firms.

As platforms evolve and compliance demands shift, we keep your tech ecosystem aligned, integrated, and built to grow so you can stay focused on clients, not complexity.



Workplace Technology & Support

- > Device Setup, Maintenance & Repair
- > Managed Print Services
- > Networking & Connectivity
- > Recycling & Secure Disposal



Infrastructure & Cloud Solutions

- > IT Infrastructure Design & Support, Procurement
- > Desktop as a Service (DaaS)
- > Managed Helpdesk
- > Cybersecurity & Risk Management



Fintech Consulting & Customization

- > Security Architecture & Consulting
- > Automation & Integration
- > Workflow Design, Automation & Integration
- > Data Migrations

BUILT FOR SCALE.
BACKED BY STRATEGY.
DESIGNED FOR
SUSTAINABILITY.

Cybersecurity Isn't Optional. It's Mission-Critical.

Today's threats are more advanced, more targeted, and more damaging than ever. You need more than basic protection. You need proactive defense built for your industry.

MASDefense protects your firm's most valuable assets:



YOUR DATA



YOUR COMMUNICATIONS



YOUR DEVICES



YOUR REPUTATION

At Myriad Advisor Solutions, we understand the heightened risks and regulatory scrutiny independent financial firms face. That's why we built **MASDefense**, a cybersecurity solution tailored to your business and its unique compliance demands.

SECURE. COMPLIANT. F

MASDefense goes beyond checking a box. With active monitoring, strategic risk mitigation, and seamless system integration, it creates a real foundation for operational security.

Developed in collaboration with industry leaders like Microsoft, Cisco, and SentinelOne, MASDefense combines enterprise-grade security with personalized service to keep your firm ahead of evolving threats.

Cybersecurity Solutions:

- > 24/7 Security Monitoring & Threat Detection
- > Vulnerability Scanning (XDR)
- > Security Compliance Review
- > Endpoint & Device Protection
- > Risk Assessments & Security Consulting

MASDefense Plus:

- > Penetration Testing
- > Disaster Recovery
- > Business Continuity Planning
- > Audit Readiness
- > Security Awareness Training
- > Incident Response Planning & Support
- > Identity & Access Management (IAM)
- > Data Loss Prevention (DLP)
- > Cloud Security Management
- > Threat Intelligence & Hunting

PREPARED

Compliance, Simplified.

4C is Myriad's proprietary compliance automation platform, built to work natively within your Microsoft environment—connecting systems, monitoring activity, and reducing manual oversight.

No more juggling vendors, tools, or trackers. Now, your firm operates in one secure ecosystem that evolves with your business and keeps pace with shifting regulations.



Key Benefits:

- > Native Microsoft 365 Integration
- > Real-Time Monitoring & Alerts
- > Centralized Oversight Across Teams
- > Reduced Risk of Human Error
- > Fewer Vendors, Less Friction

Control



Comply



Connect



Communicate



END-TO-END SERVICES

- > Website Archiving & Snapshotting
- > Unified Archiving Across Channels.
- > Pre-Filled Forms & Submission Automation
- > Email Review & Marketing Oversight
- > Attestation Tracking & Compliance Checklists
- > Policy Management & Reporting Engine
- > Customizable Review Workflows & Escalations
- > Audit Trails & Legal Hold Capability
- > Continuing Education & Training Oversight
- > Dashboard & Supervision Insights
- > Role-Based Permissions & Controls
- > FINRA & SEC Filing Support
- > CRM or Advisor Workstation Integrations

Manage compliance without ever leaving your inbox.

Launching a new firm or scaling up, **4C delivers confidence** without complexity.

COMMUNICATION SOLUTIONS **DESIGNED FOR YOUR SUCCESS.**

Reliable communication is essential to your business, but it's more than just hardware—it's about having the right support behind it.

Our unified communication services ensure every office, endpoint, and network component is expertly managed for seamless collaboration and peace of mind.

UNIFIED COMMUNICATIONS

- > VoIP Phone System Management
- > Video Conferencing, Secure Messaging
- > SMS/Text, eFax & Digital Document
- > Internet Connectivity Solutions
- > SD-WAN for Redundancy
- > Low-Voltage Infrastructure
- > User Training & Proactive Network Monitoring
- > AI-Powered Chatbots, Virtual Assistants
- > Contact Center Solutions
- > Analytics & AI Insights
- > Mobility

ON-SITE FIELD SUPPORT YOU CAN COUNT ON

Our Field Support Specialists are ready when you need them most. From new office setups and infrastructure installs to smooth transitions and live troubleshooting, they handle every detail — ensuring your team walks in ready to work.

Bringing Your Team Together, **Anywhere, Anytime.**

FROM STRATEGY TO EXECUTION, WE DELIVER:

Your brand is more than a logo or a website. It's how your business is **seen, understood, and remembered.**

Our marketing team helps you build a brand that reflects who you are, supports how you grow, and resonates with the clients you serve.



Website Design & Management

- Custom Website Development
- Ongoing Website Maintenance
- Analytics & Performance Monitoring
- Domain Hosting & SSL Management



Design & Collateral

- Custom Brochures & Flyers
- Logo Design
- Client Presentations & Pitchbooks
- Business Cards & Stationery
- Event Signage & Promotional Items



Digital Marketing & Advertising

- Paid Media Strategy & Campaign Management
- Content-Driven Campaign Design & Execution
- Targeted Audience Development & Lead Generation
- Performance Reporting & Optimization



Strategy & Consulting

- Custom Marketing Plans
- Public Relations
- Marketing Budget Planning
- Brand Strategy
- Mission and Vision Development



Welcome to Continuum Advantage

Simplifying Human Resources for Your Business

Continuum Advantage takes the complexity out of HR by combining expert support with flexible solutions tailored to your business.

Your business doesn't need an HR department — it needs an HR partner. We deliver custom support across payroll, benefits, compliance, and workforce management.

From startups to growing enterprises, Continuum Advantage helps you manage your workforce efficiently so you can focus on what matters most: your people and your business.

One Partner. Every HR Solution.

One contact for HR, payroll, and benefits

Expert support without full-time staff | Fully scalable from startup to multi-state teams

OUR CORE SERVICES

- ✓ **HR Documentation**
- ✓ **Compliance & Risk Management**
- ✓ **Payroll Administration**
- ✓ **Benefits Administration**
- ✓ **HR Management**
- ✓ **Compensation Strategy**
- ✓ **Talent Acquisition**
- ✓ **A La Carte Services**

Flexible, scalable, and comprehensive human resources solutions designed to meet the unique needs of your business.

Simplifying HR, Empowering Teams

Continuum Advantage helps small and mid-sized businesses manage HR with less stress and more efficiency. Our Advantage Program brings together HR consulting, payroll, benefits, and compliance in one seamless service, so you can keep your attention on running and growing your business.

WHAT SETS US APART



**End-to-End
Coverage**



**Real People,
Real Support**



**Scalable
& Flexible**



**One Partner,
One Solution**

HR goes beyond policies and payroll. It's about building a compliant, engaged workforce that drives your business forward.

Let's Build Your Advantage—Together.

TRANSITIONING TO INDEPENDENCE DOESN'T MEAN DOING IT ALONE

At Myriad, we understand that moving to independence is a defining point in your career. With more than 10,000 advisor transitions, our IBD Transition Support delivers confidence, compliance, and continuity

Whether you are leaving a wire house or another broker-dealer, protocol or non-protocol, we manage the regulatory, operational, and logistical details while working closely with your future firm to ensure a confidential, seamless transition aligned with your long-term goals.

TRANSITION SUPPORT

- Technology Consulting & Setup
- Entity Formation & FINRA/BD Paperwork Coordination
- Real Estate Consulting
- Office Furniture & Equipment Procurement
- Business Insurance & Employee Benefits Consulting
- Branding, Marketing & Communications Strategy
- Accounting, Bookkeeping & Payroll Support
- Unified Communications Consulting & Support
- Repapering Support

YOUR RIA, BUILT FOR WHAT'S NEXT

Launching an RIA is your chance to create a firm that reflects your vision and serves your clients on your terms. Myriad works with fiduciary advisors to build independent firms with the structure, systems, and strategy for lasting growth.

We understand the distinct requirements of RIA transitions and guide you through each step with clear plans, experienced support, and attention to detail. Our team coordinates with custodians, legal advisors, and vendors to keep the process on track and fully compliant.

RIA Launch Services

- > SEC or State Registration Support
- > Compliance Policies Setup & Management
- > Archiving, Surveillance Tools
- > Custodian Selection
- > Tech Stack Design & Development
- > Tech Automation & Integration
- > Outsourced HR, Payroll & Benefits Support
- > Turnkey Marketing Suite: Logo, Website, Messaging
- > Vendor Management
- > Repapering Support & Custodian Coordination

From solo practices to multi-advisor enterprises, we help you build with purpose and position your firm for the future.

YOUR BUSINESS. YOUR LEGACY. OUR MAP.

A proven framework to grow, transition, or exit your firm—on your terms.

You didn't build your business to leave empty-handed or unprepared. Whether you are planning for growth, leadership transition, or a future exit, the **Myriad Ascend Plan (MAP)** gives you a structured framework to turn today's success into long-term value.

Led by CEPA-certified experts, MAP is more than a strategy session or succession workbook. It is a proactive, customized roadmap to protect your legacy, maximize business value, and give you control over what comes next. Waiting until you are ready to retire is often too late. We help you prepare now.

What Makes **MAP** Different

- > A CEPA-Certified lead for continuity
- > Coordination Across Legal, Tax, & Valuation Professionals
- > Ongoing Strategy, not a One-Time Plan
- > Education, Tools, and Team Alignment
- > Flexible Services to Fill the Gaps

What's Included in **MAP**

- ✓ Custom Exit & Succession Planning
- ✓ Coordinated Exit Team Management
- ✓ Optimization & Financial Readiness
- ✓ Valuation & Tax Strategy Coordination
- ✓ Strategic Leadership & Accountability
- ✓ Education & Real-World Tools

Let's **MAP** your future, not just plan it.

Elevate Your Business with **THE ADV/SOR CLUB**

Running a business comes with constant demands. Advisor Club takes on the operational load across technology, unified communications, marketing, and HR so you can stay focused on clients and growth.

Advisor Club was created for firms that want enterprise-level resources without the burden of building and managing them in-house.

A TRUSTED NAVIGATION SYSTEM

Steady Operations

Consistent, reliable support that keeps your firm running smoothly

Flexible Support

Use what you need; we fill the gaps that free you to move forward.

Time Back

We handle the repetitive, time-consuming tasks that slow you down.

Peace of Mind

A solid foundation without operational bloat.

AREAS OF SUPPORT:



Technology (MSSP Core)

Managed IT helpdesk, proactive monitoring, cybersecurity oversight, software updates & patching, data backup & recovery.



Marketing Support

Website maintenance, light content updates, strategy guidance, access to marketing experts and preferred project pricing.



Unified Communications

VoIP administration, connectivity guidance, telecom vendor coordination, basic infrastructure support.



Human Resources Support

HR portal access, templated documents, advisory/consulting for hiring, onboarding, and policy basics.

WE PROVIDE STRATEGY YOU CAN RELY ON

Running and growing a business takes more than execution. We minimize billable hours and maximize results through trusted partners and hands-on support.



LEGAL SERVICE



REAL ESTATE & BUILDOUT



ACCOUNTING & VIRTUAL CFO



BUSINESS INSURANCE

You are not alone in these decisions

Whether it's a legal structure change, a new office, or planning your finances, our team provides the roadmap and stays with you every step.

PARTNERSHIPS

DELL

*ORION

ADP

DELTA DENTAL

Paycor

Advyzon

fmg

Principal

aruba

hp | poly

SentinelOne

brother

KAPLAN

TD SYNnex

Broadridge

Lexmark

T-Mobile

CIRCLE BLACK

LiveOakBank

United
Healthcare

CISCO

Microsoft

xerox

Pelorus Capital Management

“Shelby is absolutely a miracle worker. I appreciate all she does and how responsive she is! I like the response when submitting a project as to estimated turnaround time and it seems that you always exceed expectations. Paul has also been a welcomed addition to the team.”

2911 Wealth Management

“I wanted to shout out the Project Managers, for being so supportive & knowledgeable during this transition process. Everyone has been extremely helpful – always answered my questions and remained in contact. I cannot tell you how much I appreciate you guys. I’m able to sleep at night because of y’all so thank you. So much.”

Backshore Wealth Management Group

“Myriad has been a wonderful partner to work with. The expert service has been a huge help and relief. For the fraction of the cost of paying an employee on our staff, we have been able to rely on you to keep us up to date and compliant with all our needs. We really appreciate the great relationship and second to none service we have received from you since you started working with our group. A+++”

READY TO GROW WITH CONFIDENCE?

We've shown you what Myriad can do. Now it's about what we can do **together**.

We're ready to support your **growth** so you can focus on what matters most.

Let's talk! Reach us at info@myriadas.com

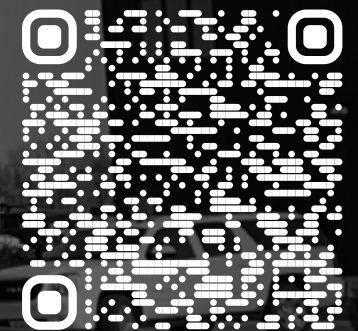
MYRIADAS.COM

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SE ENCOMPASS DR

STUDIO



FOR A DIGITAL
VERSION OF THIS
PIECE SCAN BELOW



DO WHAT

YOU DO BEST.

LET US DO

THE REST.®