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ADVISER 3.0 CONFERENCE • 2026

"So they went off together. But wherever they go, and whatever happens to them on the way, in that enchanted place on the top of the Forest, a little boy and his Bear will always be playing."



A.A. Milne · The House at Pooh Corner



WHAT YOU NEED

# Data flowing in from every source



FactFinds



LoAs



Back Offices & Platforms



PDFs



Handwritten & AI  
notes

**IMPORT DATA FROM ANY  
PLATFORM AND ANY BACK OFFICE**

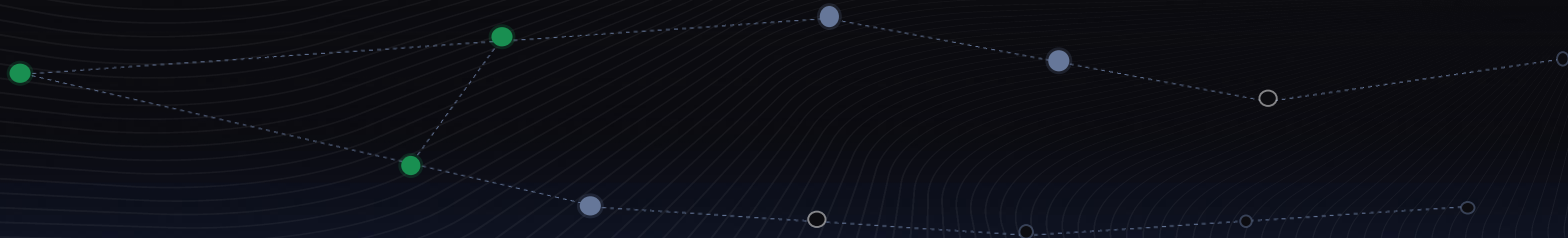


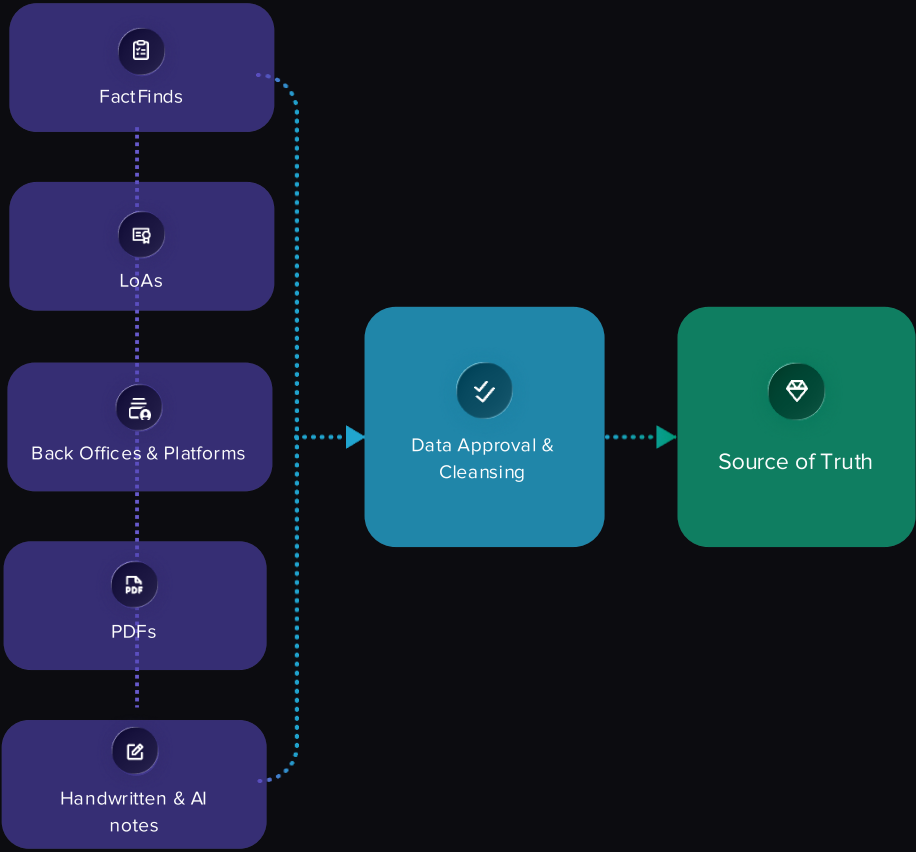
FULL API INTEGRATIONS

# Live now — and more on the way

intelliflo

**transact**



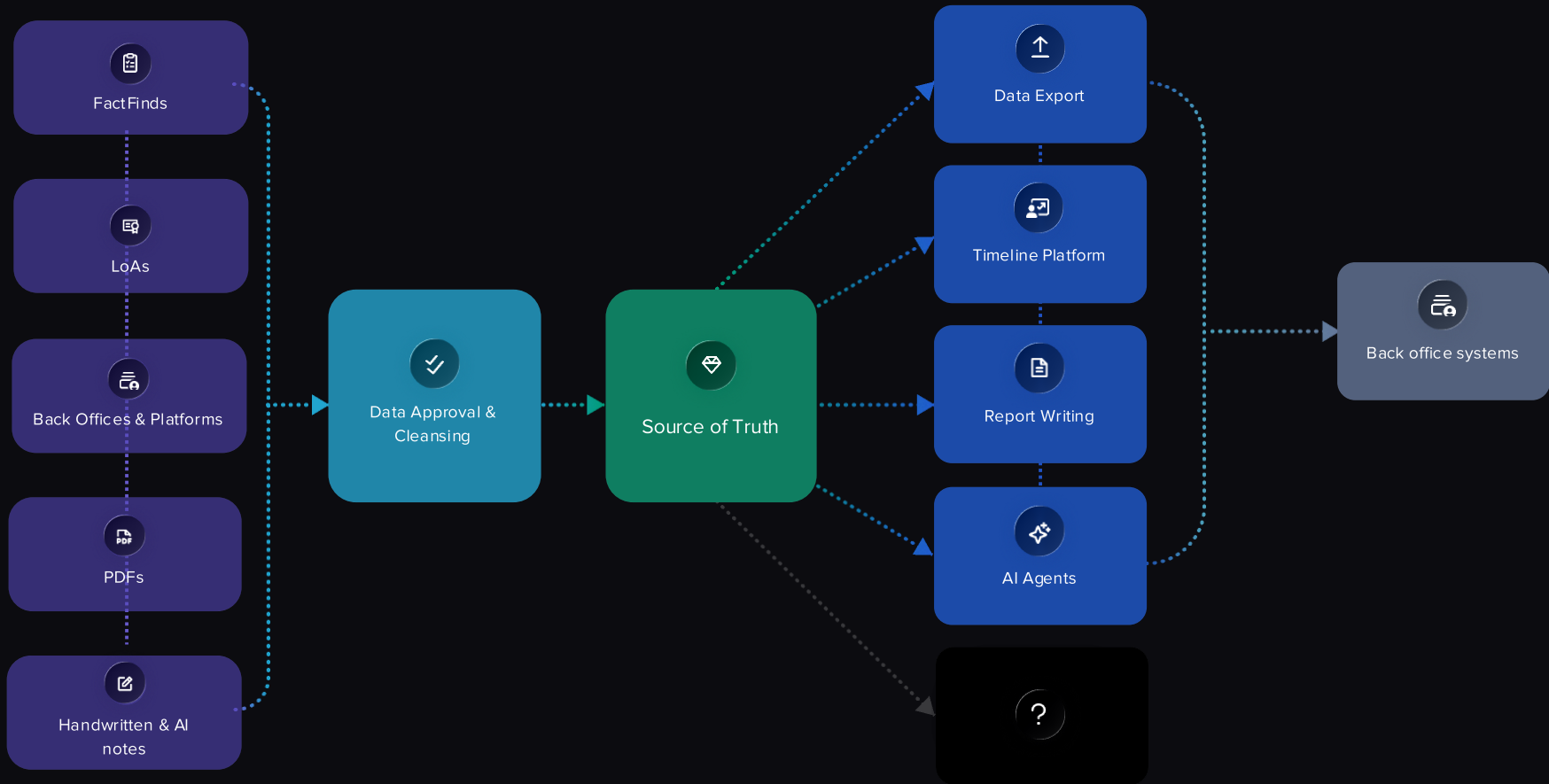


# pennee

Timeline's AI Assistant

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Powerful only because it has **all that** context.



A NEW CLIENT PORTAL

# A portal for **all** your clients.

- No matter which platform they're on
- No matter which back office system you use
- No matter what type of document you want to share
- Whether they're on Timeline Platform — or not

Every account from every platform, in one place. Secure messaging, document sharing, the financial plan and how sustainable it is — so clients stay confident, even when markets aren't.

AVAILABLE TODAY

# The operating system your team starts using **today.**



## Data that stays fresh

One source of truth across factfinds, platforms, back office and notes — always current, always trusted.



## Connected to your tools

Spreadsheet imports today, full APIs already shipping. Whatever your stack — Timeline meets it.



## AI that's actually helpful

Pennee, grounded in your real client data — useful at scale, not a clever demo.



## Every client, supported

The portal opens to everyone — Timeline platform or not, MPS or not. The choice stays with you.



# Come find us at the Timeline stall

TODAY

## Visit the stall

Find us in the main hall. Tell us about your firm and the systems you're running.

1



IN THREE WEEKS

## Sign up for your live demo

We'll show you Timeline running on your real client data — start to finish.

2



AFTER YOUR DEMO

## Unlock Pennee

Your AI assistant, grounded in every source, working alongside your team.

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