

Asset Match RIA Playbook

The Asset Match program* is designed to help RIAs grow, compete, and better serve their clients by providing access to an incentive that has been historically reserved for retail investors.

What it means for You

Level the Playing Field

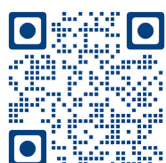
As an advisor, you can now offer your clients a benefit they often see offered to retail investors.

Client First

The Asset Match program is designed with your client in mind, helping you show value alongside your custodial services provider.

Differentiate Your Firm

Offering these benefits could help you stand out from competing advisors and attract new relationships while deepening relationships with existing clients.



*Scan for Terms and Conditions,
or [Click Here.](#)

A Suggested Client Email Template

Hi [Client's Name],

Exciting news!

Our custodial services provider, TradePMR, is offering a 50 basis point match on eligible deposits made between October 1, 2025, and March 31, 2026.

This means that when you move eligible cash or securities during this period, TradePMR will deposit the 50 basis point match amount directly into your account.* It's a limited-time opportunity designed to add value for advisors and their clients.

If you'd like to review what this could mean for your accounts or pending transfers, please reach out. I'd be happy to walk you through the full details.

Best regards,

[Your Name]

*Please see [Terms and Conditions](#) for eligibility, restrictions and requirements.

Please have your compliance department review before sending.