

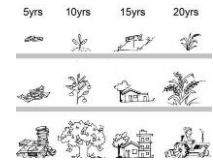
## Retention system for Brokers and IB's

*Problem statement: Most retail traders experience losses while trading, and brokers and IBs lack a strategy to retain these clients. Additionally, many brokers maintain numerous dormant accounts that were abandoned by clients after losing funds and never being funded again*

Identify clients who incurred losses due to reasons such as over-leverage, inadequate risk management, or poor lot management. This information will facilitate more effective communication with the clients.



Seek to comprehend the investment objectives of the client, whether they are inclined towards short-term trading or adopt a long-term investment approach



Reach out to education providers in your area and establish collaborations with them to assist with the following

Provide **individualized attention** to each client tailored to their unique data and characteristics.

Offer education sessions and implement strategies aimed at enhancing the likelihood of **clients funding** their accounts again.

This initiative will also enable brokers to cultivate a positive brand image by **educating clients** through reputable third-party collaborations.

The broker and education company can establish a **revenue-sharing** arrangement based on the conversion of existing clients.

