

## A high-return investment for financial advisors



To be a financial advisor these days is to be a person in motion—on the road, in the office, at coffee-shop client meetings, and more. What hasn't changed is that your clients are still counting on you for investment wisdom powered by up-to-the-minute data.

That's where Surface comes in. It's a powerful desktop to crunch financial numbers, a versatile tablet when sitting side-by-side with a client, and a portable laptop when you're away from your office. Whatever the day demands, you stay nimble and productive everywhere you go.



Surface is the most important tool that we've brought into the firm in recent history that is helping drive performance."

**Christian Wallace**  
Research Analyst  
Emancipation Capital



8:00 A.M.

Catch the global market updates, then connect to the company network, check your schedule, and start your day feeling prepared.



10:00 A.M.

Dock Surface and connect to multiple monitors. Surface easily runs all the programs you need—from PowerPoint to Excel spreadsheets—simultaneously.



2:00 P.M.

Use Surface in tablet mode to conduct a portfolio review with a client in brilliant HD. Meanwhile, Surface Pen helps you quickly capture an idea, or a client signature.



6:00 P.M.

Your client meeting was a success. And since you've made effective use of your downtime throughout the day, your follow-ups are already done. No need to head back to the office.

# See what sets Surface apart

**Log on with a smile**  
With Windows Hello and the Surface camera, you can log on more securely and quickly—no password required

**Bright and beautiful**  
Engage customers with a brilliant, full HD touchscreen

**Keep connected**  
USB, mini DisplayPort, and microSD™ to transfer files, add storage, and more

**Work from anywhere**  
Thin, light, and versatile with a multiposition, built-in Kickstand

**Make your mark**  
Take notes, get signatures, and close the deal with Surface Pen<sup>2</sup>

**Laptop performance**  
One of the thinnest keyboards around, Type Cover<sup>1</sup> turns your Surface into a premium laptop

Surface Pro 4

Runs the software<sup>3</sup> financial advisors rely on, including:



## Maximize productivity

- Power through the day with its long-lasting battery<sup>4</sup>
- Shift from laptop to tablet when you're out meeting clients
- Take searchable, handwritten notes with Surface Pen and OneNote

## Look your best

- Greet clients with a thin, light, premium device
- Carry less to stay organized
- Present on a brilliant HD touchscreen

## Improve ROI

- Reduce the need for more devices
- Lower management costs with fewer devices
- Decrease security risks with Windows 10

## Featured add-ons



### Surface Type Cover

Optimal key spacing helps deliver fast and fluid typing while an enlarged glass trackpad offers precision control.



### Surface Dock

From ultraportable to ultraproducer: Connect to dual monitors, speakers, a full-size keyboard, and more.



### Incipio Feather® Case

Guard your Surface from dings and dents while on the road.