



Levitante

Financial Customer Testimonials

Referrals and Interest



“**Every financial adviser needs to utilize Levitate.** We have strengthened existing client relationships, **received more referrals and generated interest** in programs that help the clients we serve. Our communication with clients and prospective clients has been enhanced as a result of using Levitate. I highly recommend it.”

— Levitate customer of 2 years



Amazing Support

“I can't say enough great things about Levitate and, in particular, our success specialist, Tiara. Levitate has taken the often daunting task of email campaigns and made the process **a simple and effective** way to reach out to our clients. Tiara has been integral in our progress - holding our hand the whole way and we see the rewards on a daily basis. She is **always there** to answer any questions we may have, **offer suggestions and solutions**. Whatever they pay her, it's not enough!”

— Levitate customer of 2 years



On Choosing Levitate

"We finally found the product that fit exactly what we were looking for. **Direct API with Gmail, wonderful (non-“salesy”) email templates, ability to send emails from multiple addresses, no unsubscribe button, and on and on...** we are absolutely loving Levitate.

We were a hard sell after being **disappointed by several other** financial services marketing platforms. I was impressed with the team's tenacity as they saw the value they could add and tried to get us on board—and **so grateful that we ultimately chose Levitate.**"

— Levitate customer of 3 years

Not “Cookie Cutter”



“We can’t say enough great things about Levitate. The program integrates beautifully and is super easy to navigate. It’s not “cookie cutter,” which is always a big hurdle in marketing. It’s **custom and fun** and the support is AMAZING. Our success specialist is our go-to and he’s always super fast to respond with a solution. Every. time. And I mean every time. If you’re on the fence, rest assured, **it’s worth it!**”

— Levitate customer of 2 years



The Perfect Tool

“Money is personal, and **this tool gives you the absolute best fighting chance to build meaningful relationships with clients and prospects.** Levitate is the perfect tool for the financial advisory industry.”

— Levitate customer of 5 years

Client Engagement



“Our company has been using Levitate for over a year now and we couldn’t be happier. **They are constantly adding new content and ease-of-use features.** Louis, my success specialist, is always patient (even when I’m being completely tech illiterate) and has wonderful suggestions on how to take full advantage of what they offer. Our **client engagement has definitely increased** since using them.”

— Levitate customer of 2 years



Shouting It From The Rooftops

“I want to shout from the rooftops how amazing Levitate is! We are a wealth management firm utilizing Levitate. We use Redtail as our CRM and their partnership is amazing. Levitate has made us **so much more efficient**, and we’ve only been using it for a little over a month.”

— Levitate customer of 1 month