WEALTHSQOPE

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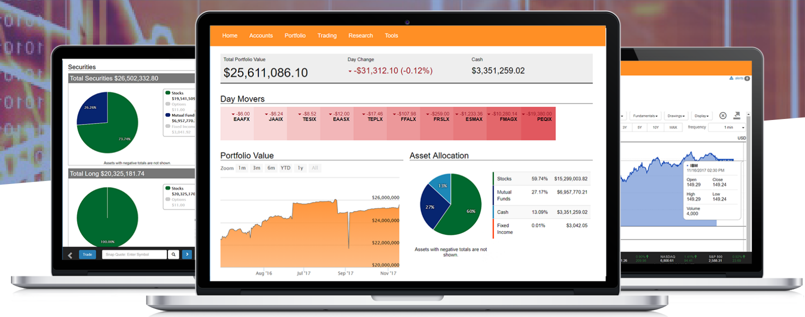

Digital Client Engagement to Grow & Retain Your Client Base

Wealthsqope allows your firm to deliver industry-leading functionality across all investment channels and accelerate your digital transformation.

Provide a unified digital client experience to attract and retain clients by delivering continuous industry-leading enhancements to keep clients engaged and coming to your firm's site

Enhance the client/advisor relationship by providing the transparency and control clients want and expect, allowing advisors to focus on the more "personalized" needs of their clients

Implement flexible technology to provide your organization with control over the firm's user experience while realizing a significant expense reduction of a fully customized build

WEALTHSQOPE BASE PACKAGE

Account Management

Real-time account access and management capabilities

User Configured Dashboard and Dock

Ability to view information in a way that makes sense to your investors

Personal Portfolio Management

Greater clarity and control of investments for your investors

Money Movement

Automated money movement between bank and brokerage accounts

Markets and Investments

Integrated access to premium research & real-time market information

Online Document Delivery

Secure, electronic delivery and management of trade confirms statements and 1099s

Mobile & Tablet

Personalized brokerage services to IOS, Android and Voice Recognition devices

Admin Console

Management and control of user workflow and access to full audit trails

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UNIFIED DIGITAL CLIENT EXPERIENCE

Wealthsqope provides a unified digital infrastructure to support multiple lines of business in a single digital storefront, providing your firm’s clients with a consistent user experience

Self-Directed

- Account-specific Home Page
- Trading
- Account Opening
- Personal Portfolio Management Upgrades

Digital Managed (Robo)

- Account-specific Home Page
- Investor Profiler & Strategy Selector
- Account Opening
- Portfolio Management Interface

Advisory

- Account-specific Home Page
- Advisor Connect
- Advisor Information Widget

Managed Accounts

- Account-specific Home Page
- Advisor Connect
- Portfolio Management Interface

Trust Accounts

- Account-specific Home Page
- Trust Page Configurations

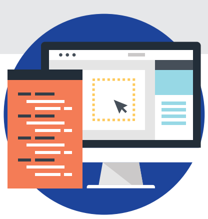
FLEXIBLE INTEGRATION METHODS

Embedded Widgets, Web Services and Configured Pages give your organization complete control to achieve your firm’s specific client experience and accelerate your digital transformation

Embedded Widgets

- Configurable web components that can be embedded into your firm’s designed experience
- Components fully integrated with data and your firm’s configurations
- Significant control, without the heavy lifting of full front end development

Web Services



- Comprehensive suite of commercial web services to support your firm’s specific development requirements
- Complete control to develop your firm’s digital wealth management applications

Configured Pages

- Fully functional pages that can be integrated into your firm’s site navigation
- Supports moderate look and feel configuration, fastest speed to market

USE INDIVIDUALLY OR COMBINE THE OPTIONS TO MEET YOUR FIRM’S SPECIFIC NEEDS