POWER UP YOUR PRACTICE!

INNOVATION AWARD WINNER* TECHNOLOGY

ADVISOR DASHBOARD®

Integrated, Easy, High-Tech – You'll Only Find It Here

* The Bank Insurance & Securities Association (BISA) is designed to recognize leadership in the advancement of the financial services industry's products, services and platforms through technology innovation. This award highlights companies for their commitment to advancements in technology-based solutions for the industry.

ONE INTERFACE

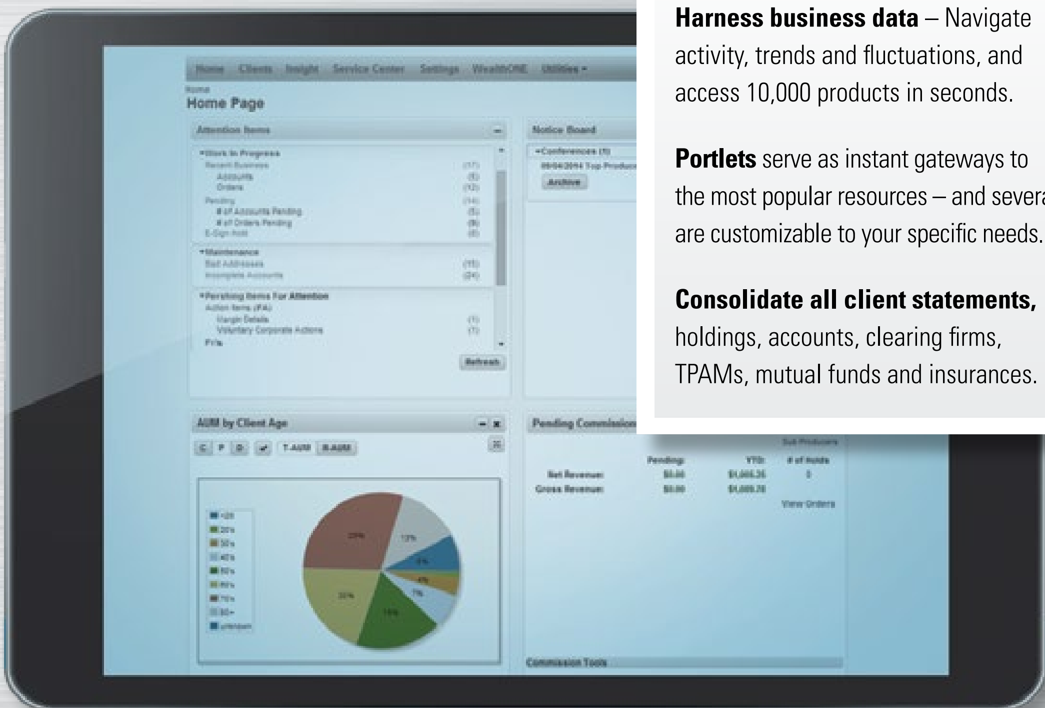
Advisor Dashboard integrates internal and external data sources into one seamless, consolidated environment. Access client accounts, holdings and statements … e-messaging and notifications … reports and business intelligence – all here, **all in one place.**

SMARTER BUSINESS INTELLIGENCE

Harness business data – Navigate activity, trends and fluctuations, and access 10,000 products in seconds.

Portlets serve as instant gateways to the most popular resources – and several are customizable to your specific needs.

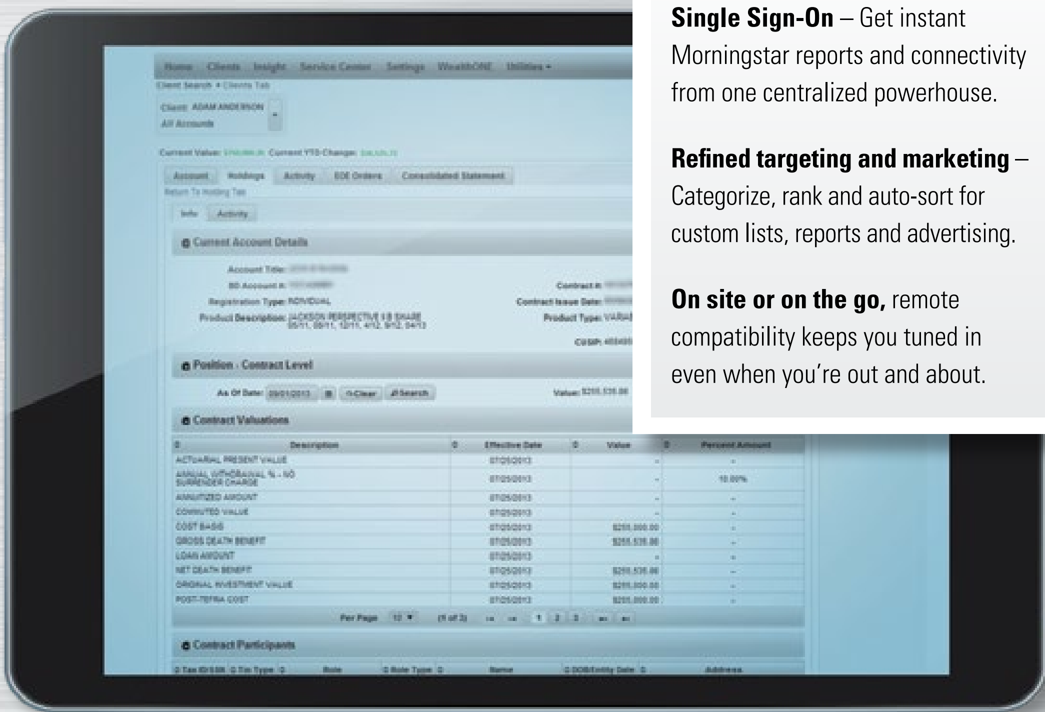
Consolidate all client statements, holdings, accounts, clearing firms, TPAMs, mutual funds and insurances.



"Advisor Dashboard is our trademark tech solution with powerful tools that access and analyze more data at a deeper level than the nearest competitor."

ONE CLICK

Single Sign-On means there's no need to continually log into one site after another. Connect to messaging and email, industry reports and websites, and other essential resources through a single access point – **Advisor Dashboard.**



EASIER PRACTICE MANAGEMENT

Single Sign-On – Get instant Morningstar reports and connectivity from one centralized powerhouse.

Refined targeting and marketing – Categorize, rank and auto-sort for custom lists, reports and advertising.

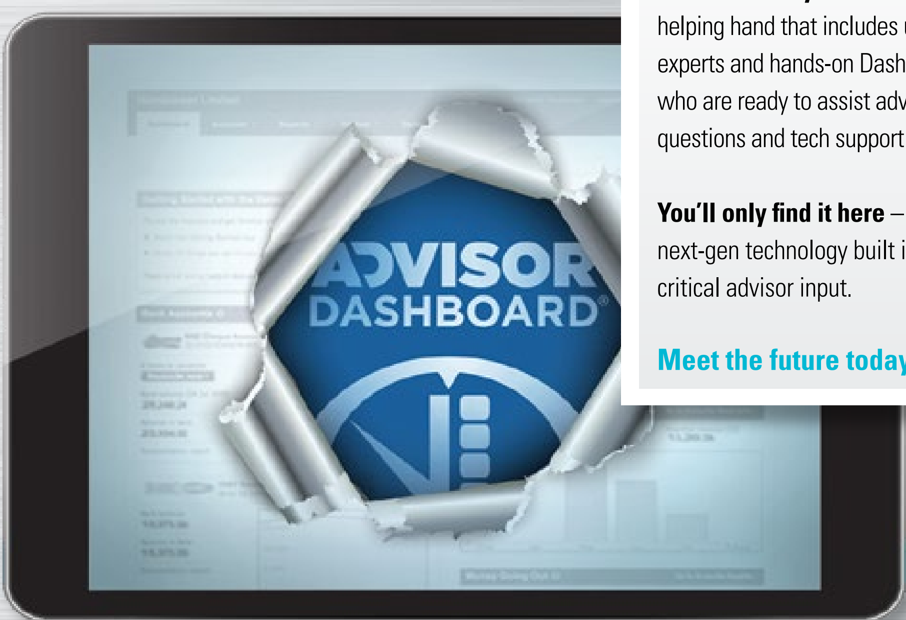
On site or on the go, remote compatibility keeps you tuned in even when you're out and about.

"Drift Alerts notify me as clients change status so I can act promptly – just set it up with your segmentation and Dashboard does the rest."

ONE SOURCE — HERE

Advisor Dashboard is leading technology you will only find at the NPH family of broker-dealers. Our trademark interface was built from the ground up, hand in hand with advisors.

Join us, log on and move your business forward.



UNMATCHED TECH AND SUPPORT

Front Office Systems Support – the helping hand that includes user-experience experts and hands-on Dashboard pros who are ready to assist advisors with their questions and tech support.

You'll only find it here – unmatched, next-gen technology built in tandem with critical advisor input.

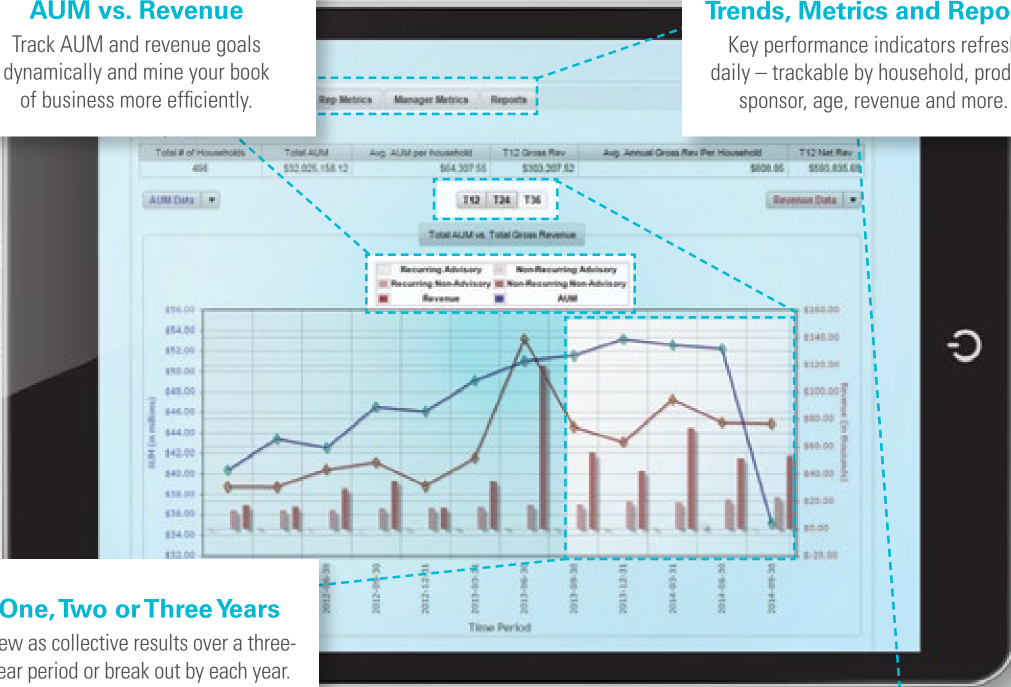
Meet the future today!

"Get key business performance indicators, client analysis and investment product access, all in one user-friendly, customizable tech tool."

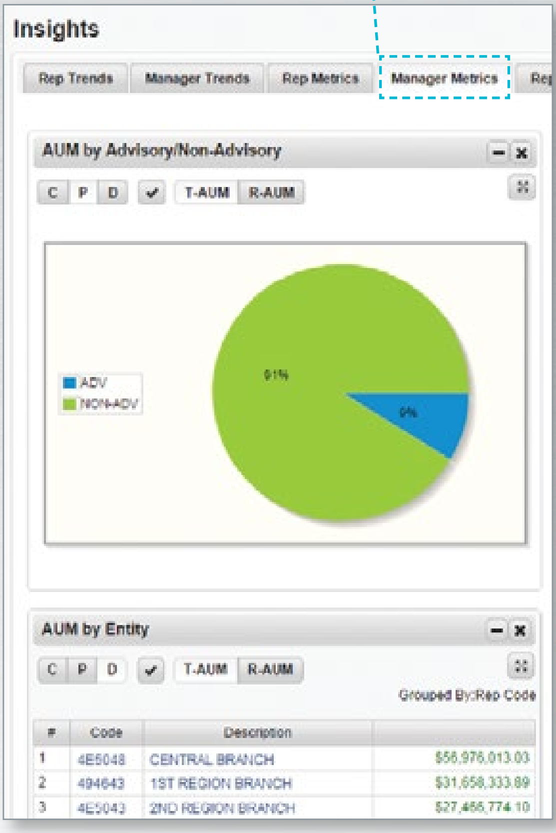
MANAGE YOUR BUSINESS

AUM vs. Revenue
Track AUM and revenue goals dynamically and mine your book of business more efficiently.

Trends, Metrics and Reports
Key performance indicators refresh daily – trackable by household, product sponsor, age, revenue and more.



One, Two or Three Years
View as collective results over a three-year period or break out by each year.



Efficiently identify new opportunities at the client level or by product. It's easier with Advisor Dashboard as you view your business activity in a snap. You can gauge where your practice is – and where you'd like it to go and grow.

Navigate Trends – Identify revenue spikes and fluctuations so you can manage your time and strategies toward those trends.

Leverage Business Intelligence – Access 15 billion records of up-to-date data on products, vendors, accounts, activity, client positions and more – all in seconds.

Enable Succession Planning – Determine the real valuation of your practice, including what percentage of your book of business is investment advisory, trail revenue and more.

CONSOLIDATE YOUR DATA

All Assets, All Together
View client assets by automated households or other viewpoints, customized to your preferences.

Consolidated Statements
Get statements on demand quickly or produced by automatic system generation on a schedule.

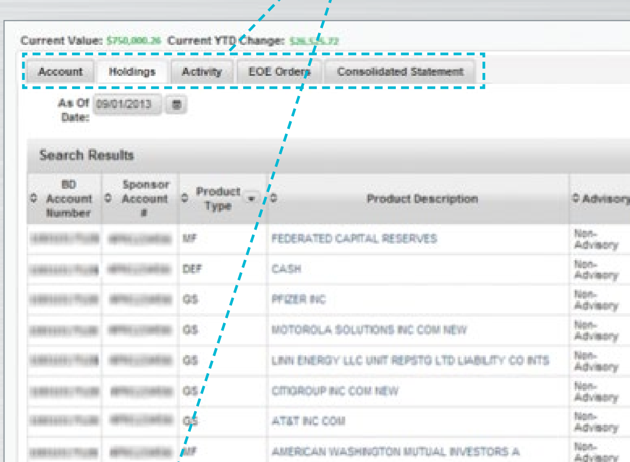
Detailed Holdings Pages
Drill down into detailed account info, holdings, products and activity from multiple sources – all with a single sign-on.

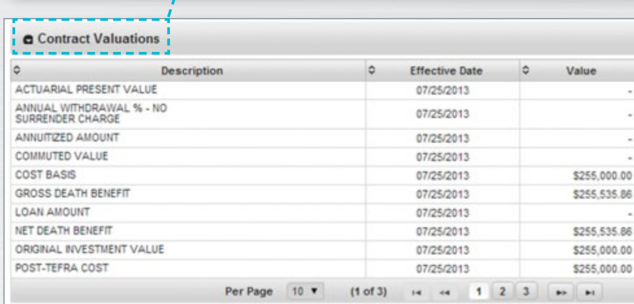
Enjoy a fully automated look at all critical data, such as client, product, activity and positions (including TPAMs, clearing firms, mutual funds, insurances), updated nightly from reliable sources and available at open of business next day.

Single Sign-On, Integrated Partners – Everything is accessible and linkable through the Advisor Dashboard. One or two clicks and you have broker-dealer technology and tech partner info collectively, all at your fingertips.

World-Class Service Enabler – Consolidating revenues and assets into a single, user-friendly tool helps advisors offer better overall service.

Advanced Filtering – Answer critical business questions: Should I grow my fee-based business? Is my product offering diversified enough? Should I renew specific state licenses?



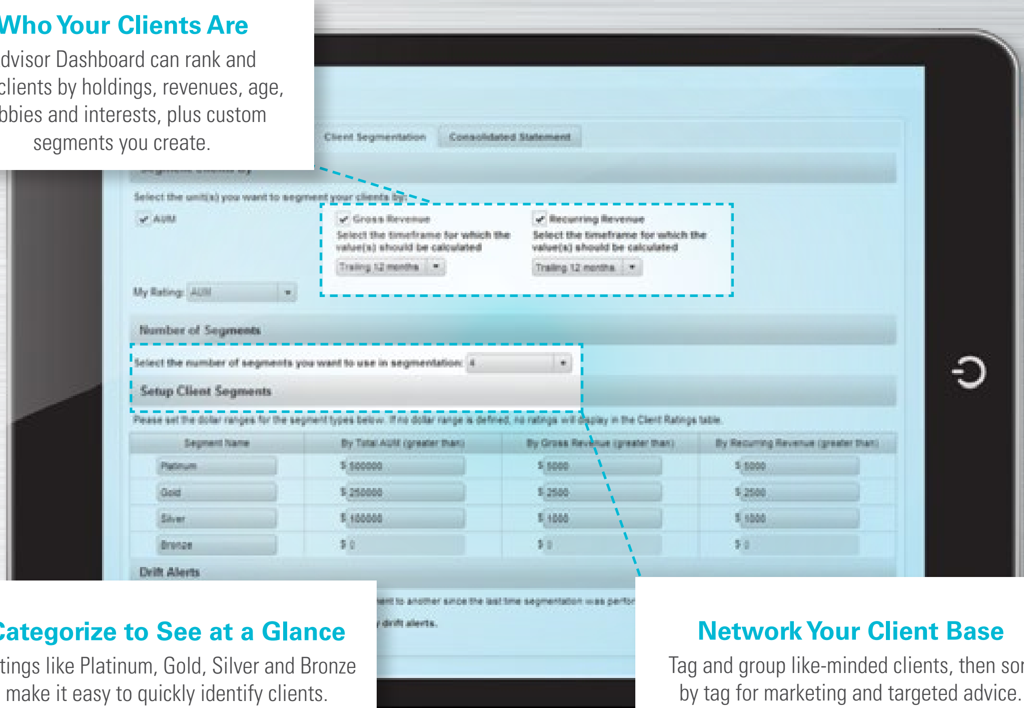


AdvisorDashboard.com

SEGMENT YOUR CLIENTS

Who Your Clients Are

Advisor Dashboard can rank and sort clients by holdings, revenues, age, hobbies and interests, plus custom segments you create.



Categorize to See at a Glance

Ratings like Platinum, Gold, Silver and Bronze make it easy to quickly identify clients.

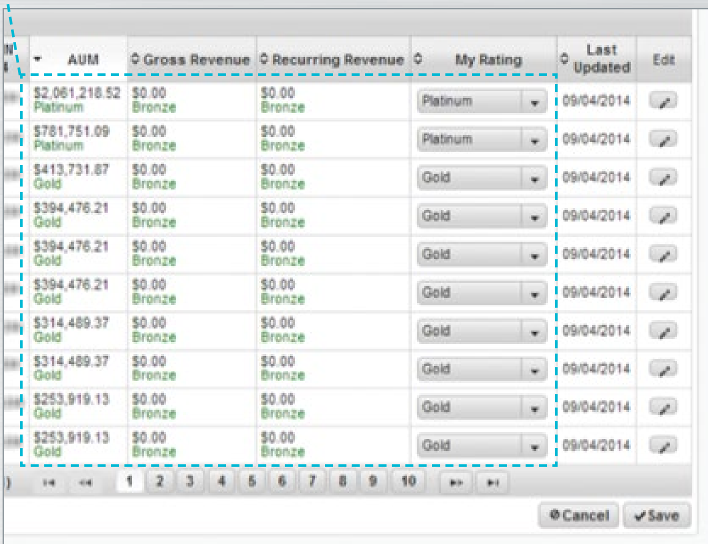
Network Your Client Base

Tag and group like-minded clients, then sort by tag for marketing and targeted advice.

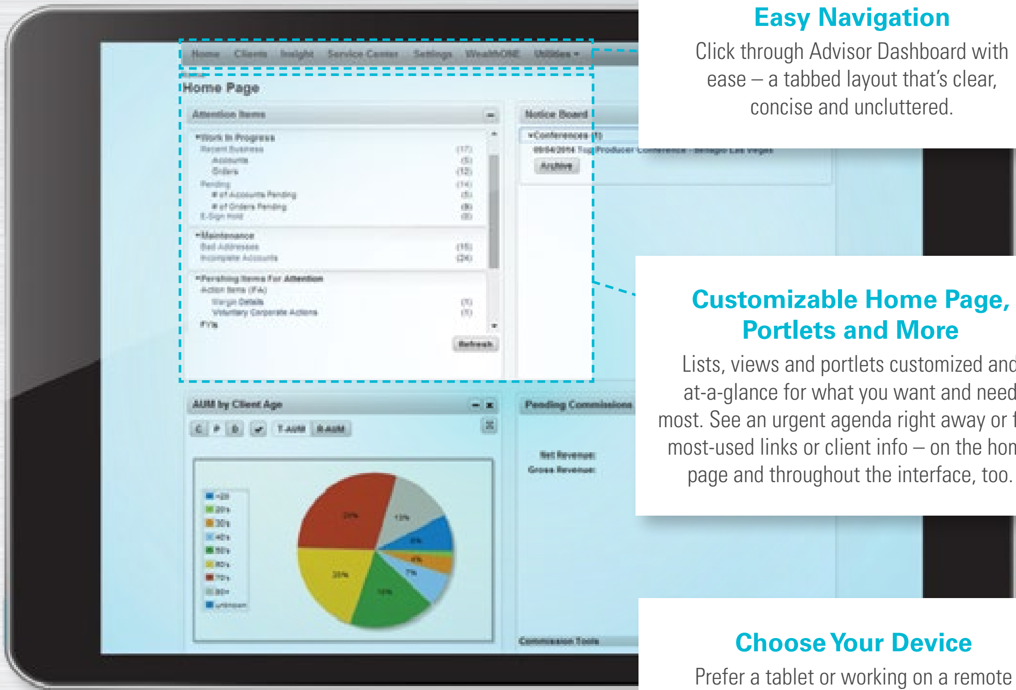
Segmentation is a major way Dashboard helps you increase your capabilities, reveal opportunities and mine your book of business. Automated functionality makes it easy to sort and slice and dice nearly any way you please.

Maximize Your Time and Effort – Instead of making assumptions, you can efficiently find the data you need about your clients.

Mine Big Data for Opportunities – Ultimately, Advisor Dashboard provides a more thorough, thought-provoking platform to help manage your practice in the best possible way.



CUSTOMIZE YOUR EXPERIENCE



Easy Navigation

Click through Advisor Dashboard with ease – a tabbed layout that's clear, concise and uncluttered.

Customizable Home Page, Portlets and More

Lists, views and portlets customized and at-a-glance for what you want and need most. See an urgent agenda right away or find most-used links or client info – on the home page and throughout the interface, too.

Choose Your Device

Prefer a tablet or working on a remote desktop? It takes your business with you – user-friendly functionality wherever you go.

Dashboard isn't an off-the-shelf interface. We spent years in development, with our top tech team working hand in hand with advisors to capture and solve real-world experiences. This allows you to mold Advisor Dashboard to fit your specific needs.

Personalized Favorites Bar – Do you have websites you visit on a daily basis? No matter what you like, add it to your favorites bar and get there fast with a click.

Your Preferences Are Advisor Dashboard's Preferences – Some advisors want to immediately view their clients by commissions generated. You can do that. Others prefer to go right to the list of clients by product type. Not a problem. It's easy to customize and Front Office Systems Support, or FOSS, is a call or click away as you explore Dashboard.

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