WEALTHONE

Wealth Management, Redefined

Advisory, realized.

You work hard to build relationships with your clients, help them set financial goals, then create strategies to achieve them. Your wealth management platform needs to be powerful, versatile and easy to set up and use. It has to save you time, so you can spend more of your day doing what you love – meeting with clients.

One platform.
Multiple solutions.
Fully integrated.

One platform. Multiple solutions.

Flexibility is key to meeting clients' demands.

Clients have a wide range of investment needs, so your wealth management platform must provide flexibility. WealthONE® is the only platform that allows you to act as portfolio manager and leverage carefully selected, world-class money managers. You can also combine one or both of these options with guaranteed sources of income, all in one place. When wealth management solutions team up with the best-in-class technology, you become more efficient, effective and achieve the results you and your clients want.

Strategist Solutions – Access carefully chosen world-class asset managers that include strategic, tactical, active and passive investment options. With access to ETF and mutual fund portfolios, you can provide clients with portfolios designed for growth, income, tax-managed, or any combination. Merged with a fully integrated risk profile and comprehensive strategist research, Strategist Solutions is the platform for first-rate money management.

Advisor Solutions – Use a suite of tools designed to help you create and maintain model portfolios, build proposals and track existing prospects and clients. You can customize several different compliance-approved client reports and select from a wide range of product offerings. Advisor Solutions offers straight-through trading and rebalancing, allowing for quick and efficient implementation of portfolio changes.

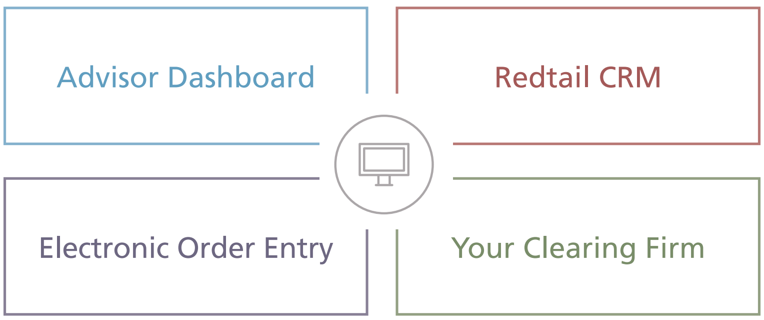
Guaranteed Income Solutions – Gain access to annuity options that may include the ability to guarantee an income stream* with no-load, low cost, low M&E annuity products. This option provides tax-deferred growth and a wide range of professionally managed underlying investment options with the potential to reduce income risk.

*Guarantees based on the claims-paying ability of the underlying insurance company

Fully integrated.

Seamless technology saves time and creates efficiencies.

You and your staff only have so many hours in the day, so your wealth management technology needs to quickly mesh with your existing systems and not waste your time. WealthONE fully integrates with:



Integration is just the beginning. You can reduce paperwork and time spent submitting business by using Electronic Order Entry's (EOE) eSign feature. Keep proposals, billing statements and performance reports in one secure, convenient location. Brand and customize proposals and quarterly performance reports with your logo. And provide clients 24/7 online account access.

Unmatched support.

Full-service support lets you grow and thrive.

Financial advisors that utilize professional consultants find it easier to grow and thrive. You have access to multiple consulting teams to assist you with your business which include:

WealthONE Team – With access to your back office systems, this team truly partners with you and your support staff. They can help segment your clients, find opportunities to standardize your service model, provide practice management ideas, offer product and platform training, and help with case design, model creation, proposals and EOE.

Technology Solutions Team – This team can show you how to use Advisor Dashboard® to its fullest potential so you can track your growth, run reports that show additional opportunities, and provide better insight on how your AUM and revenue correlates. They can also show you how to use EOE to simplify and speed up account opening – with less paperwork.

Advisor Growth Team – There's no one-size-fits-all solution to business growth. This group's consulting programs will help you examine the most important aspects of your business and develop a customized plan to move your business forward. They will help you focus on the Four Cornerstones of Success – business strategy, marketing, human capital and business evolution (succession, mergers and acquisitions).

New Business Development and Advisor Experience Team – These professionals excel at bringing new advisors on board, ensuring a smooth transition, mapping advisory business, and will also assist with specialized ongoing training.

Wealth management is the centerpiece of your business.

Here's how WealthONE brings it all together.

WealthONE is the advisory platform you can rely on. We have the people, solutions and technology to empower your wealth management business. Here's why WealthONE is the platform so many advisors depend on.

Solutions

You can manage portfolios yourself or outsource management to some of the world's top portfolio managers.

WealthONE gives you access to a wide variety of investment options to serve your clients' needs.

Technology

WealthONE is the only platform that talks to your back office through the Advisor Dashboard interface, so it provides a picture of your clients' financial health.

It connects to your business's infrastructure, making interactions seamless and easy.

People

Studies suggest that advisors who function as part of team are more successful.

WealthONE's consulting teams are standing by to support you with the advisory platform, technology, practice management or transitioning.

One platform. Multiple solutions. Fully integrated.

Take the next step to success with WealthONE.

Contact us at **877-565-0246** to take full advantage of the solutions, technology and support teams that can help assist your wealth management business.

WEALTHONE®

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