Methuselah®

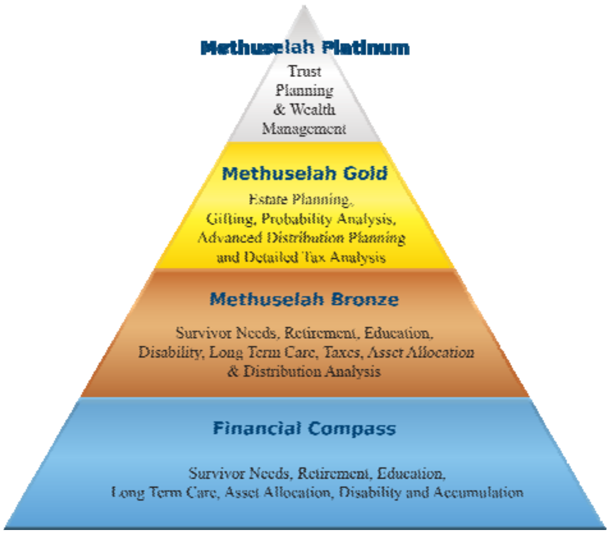
scivantage

Comprehensive Planning and Wealth Management Solution to Drive Revenue and Build Long-term, Profitable Relationships

Methuselah is a sophisticated financial planning solution that enables financial advisors and planning departments to deliver actionable, complete advice that helps clients meet their lifetime financial goals. Offering the most comprehensive set of advanced estate and trust planning capabilities, Methuselah is the ideal solution to help attract and retain high and ultra-high net worth clients. Methuselah offers a host of features to help simplify the complex financial planning process and ensure thorough case preparation, including:

- Easily choose between goal or cash-flow based analysis
- Comprehensive life events planning, including retirement, education, major purchase or other cash flow events
- Risk management planning through capital needs, disability income needs and long-term care analyses
- Advanced estate, tax, trust and gift planning capabilities
- Dynamic, on-screen analysis illustrates immediate impact of plan modifications
- Easy-to-understand, professional reports and report templates
- “What-if” scenarios allow for quick changes to plan variables and real-time modeling

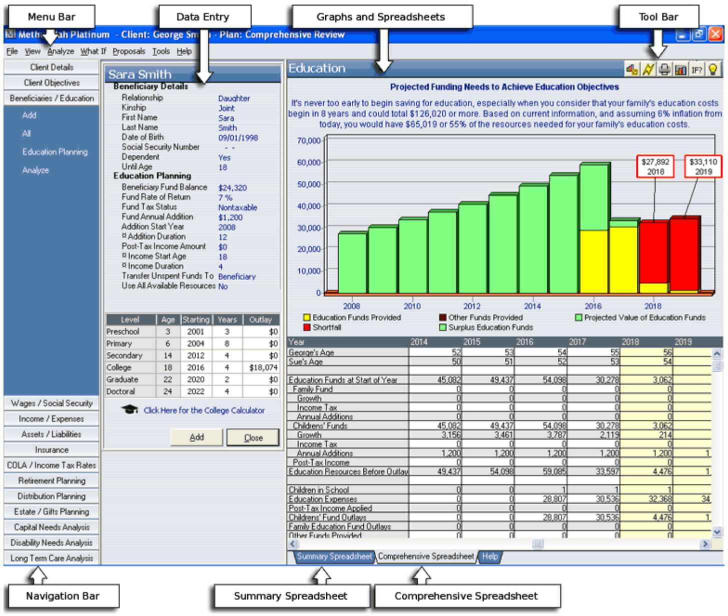
Methuselah offers three levels of sophistication geared towards supporting the different stages of the financial advisory process and varying client types.



BENEFITS

- Intuitive, easy-to-use solution allows for quick and efficient case creation
- Flexible planning options–from single-goal or event analysis, such as retirement or an unexpected death or disability, to a comprehensive financial plan
- Clear, compelling client reports are designed to foster greater client interaction and understanding
- Advanced estate and trust planning capabilities to attract and retain high and ultra-high net worth clients
- Integration framework to facilitate data sharing with other third-party systems, including CRM, data aggregation and portfolio management tools

Methuselah is an innovative and user-friendly financial planning software tool that helps financial advisors build lasting client relationships. Methuselah enables advisors to present tailored solutions to help their clients meet their specific financial goals and objectives.



While a comprehensive toolset; the software supports quick and efficient case creation for standard "goals based" plans. The side-by-side layout of data input and analysis allows the advisor to immediately see the impact of plan modifications, one of the many time-saving features of Methuselah.

Key Features

- Goals and cash flow-based analyses
- Needs assessment
- High-quality, professional reports and report templates
- Integrated asset allocation
- Retirement, life events, education and employee stock options planning
- Advanced estate and trust capabilities
- FLPs, LLCs, S Corp and C Corp
- Advanced IRA distribution planning including 401(a)(9) and 72(t)
- Centralized data
- Compliance reporting
- Flexible delivery and configuration options

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