

Integrated Wealth Management Solution for Financial Professionals

Scivantage Professional '09 is the latest version of our integrated financial advisor workstation, offering significant enhancements and newly integrated applications to help financial advisors manage their book of business more effectively and increase overall productivity. This innovative wealth management solution now includes our Financial Compass™ planning suite, enhanced Account Opening and Maintenance, advanced trading features and essential research and market data. Additionally, Professional '09 offers a streamlined user interface that utilizes the latest web technology to allow for configurable navigation panes, modal windows, expanded power search capabilities and an overall improved user experience.



► Financial Planning

Through the integration of Financial Compass, financial advisors now have seamless access to a robust goals-based, needs analysis tool that enables them to quickly evaluate their client's financial situation and produce actionable, easy-to-understand presentations in a few simple steps. Its highly intuitive interface is specifically designed for quick analyses and ease of use. Financial Compass supports the following seven sales-oriented strategies:

- Asset Allocation/Investment Planning, Retirement Planning, Education Funding, Event Funding, Life Insurance, Long-Term Care and Disability Income

► Enhanced Account Opening & Maintenance

Scivantage's Account Opening & Maintenance suite has been re-architected to expand the flexibility and overall configurability of the application—reducing the time and costs of implementation. New risk management features, such as real-time field validation, business rules integration and improved workflow, make certain that consistent decision-making and edit check criteria are applied throughout the account opening process.

► Advanced Trading: Block Orders

Available as a premium service of Scivantage Trading, Block Orders simplifies the process of entering trades into client accounts, while providing average pricing capability to reduce the transaction costs for clients and/or the advisor. Advisors can now effect transactions against many accounts, or groups of accounts, in a single order entry session.

► Real-time Research & Market Data

Scivantage Professional '09 provides access to the tools and information advisors need to stay current on the latest market movements. Easily access real-time, fundamental and historical data from a single, integrated resource. Monitor all aspects of the markets, ranging from real-time research on companies, exchanges and regions to interactive charts and investment screeners.