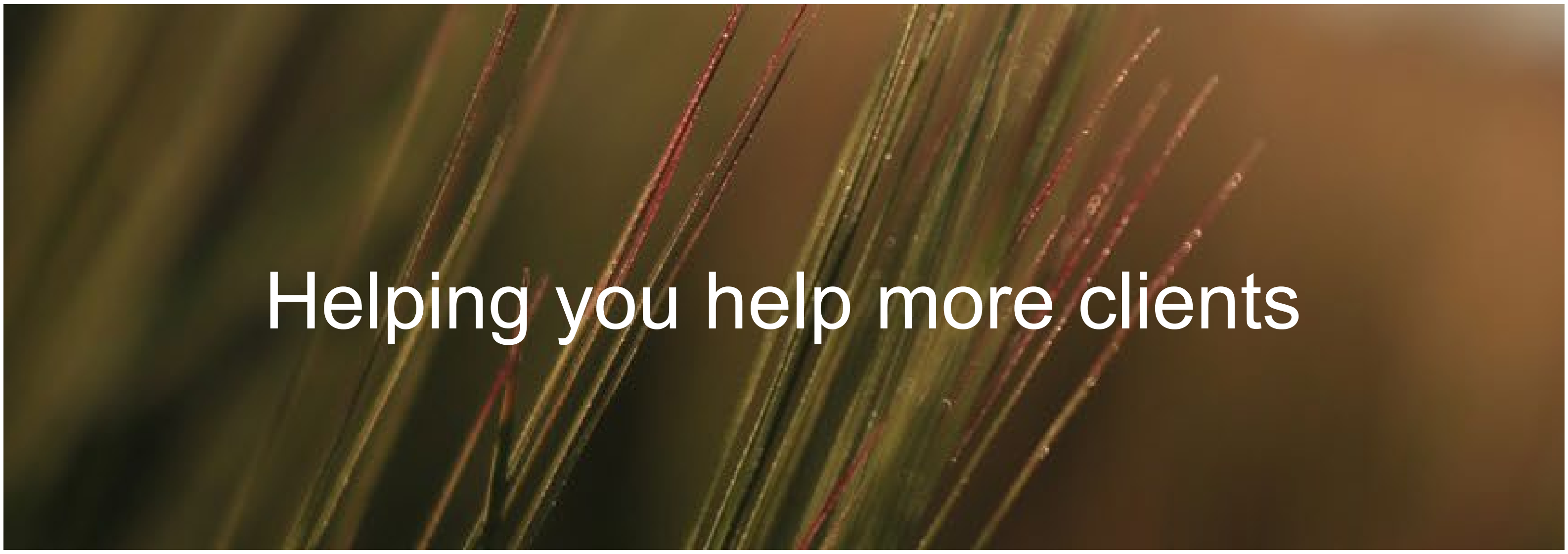
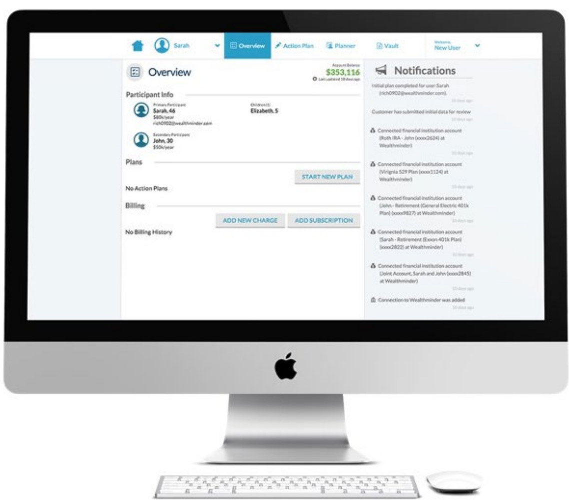




Wealthminder Virtual Assistant

Continuous improvement is about removing the things that get in the way of your work.

-Bruce Hamilton

Wealthminder's planning solution helps you to work with your clients more efficiently. Through our easy-to-use, custom-branded interface, you can make your planning process more interactive. Clients have the ability to input their own data, review your recommendations, and notify you when they have taken action all online.

Wealthminder make three of the

most-challenging aspects of the client-management process easier for advisors.

Data Collection

TRADITIONAL WAY

Advisors hold lengthy meetings with clients to gather information about their goals, preferences, and current holdings.

401k-plan Advice

TRADITIONAL WAY

Advisors request statements from clients before each meeting, manually making recommendations based on plan options and the advisor's allocation model.

Client Follow Up

TRADITIONAL WAY

Advisors or assistants call clients after meetings to ensure they are following up on advice.

Data Collection — WEALTHMINDER WAY

Clients input information online in advance, giving you time to review it before a meeting.

401k-plan Advice — WEALTHMINDER WAY

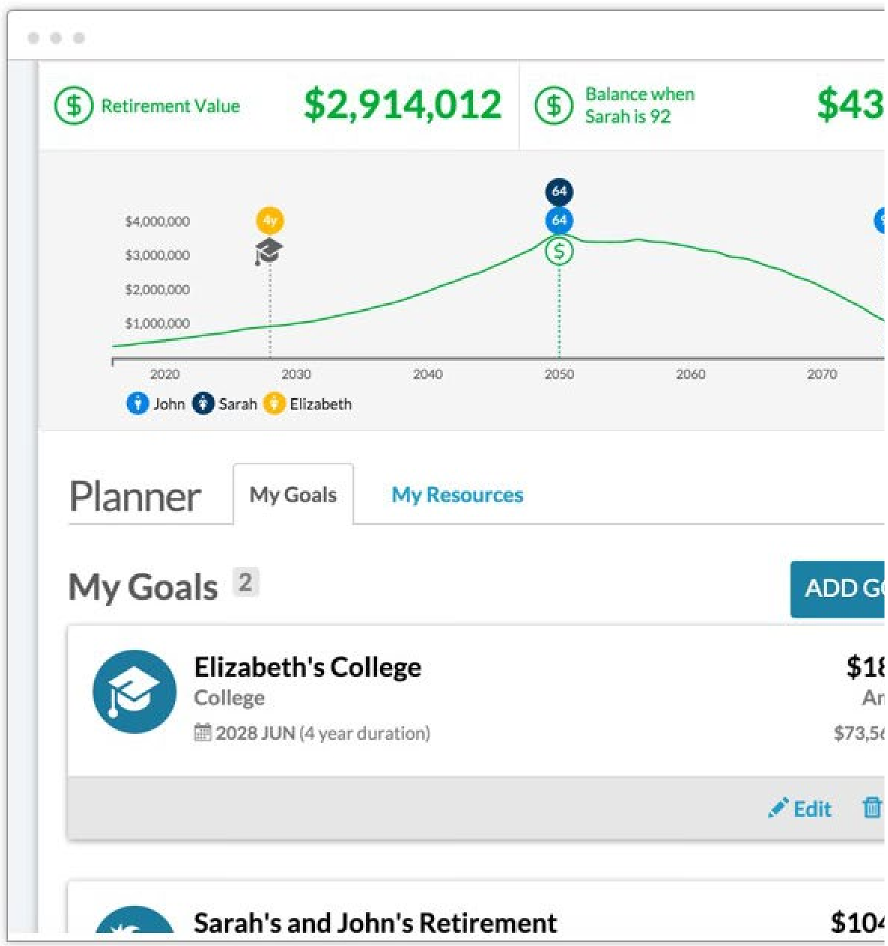
Clients connect their 401k plans via Wealthminder's account aggregation engine. Wealthminder

Client Follow Up — WEALTHMINDER WAY

Clients check off completed items in Wealthminder, giving you the ability to view each client's progress at a glance.

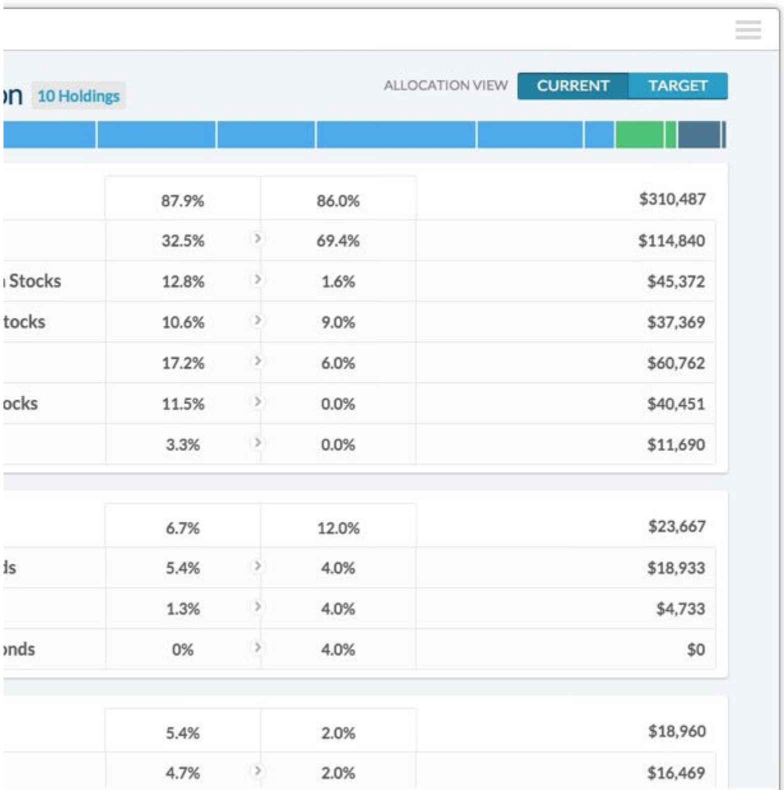
makes recommendations automatically using your custom allocation model and the plan's investment choices.

Features of the Wealthminder solution



Goal-based Planning

A simple interface with powerful capabilities. Wealthminder's planning engine combines a client's goals, time horizon, and risk tolerance with your market expectations and investment models to determine how likely they are to achieve their objectives. When it looks like a client will fall short, you can adjust the plan or choose from our suggested revisions.

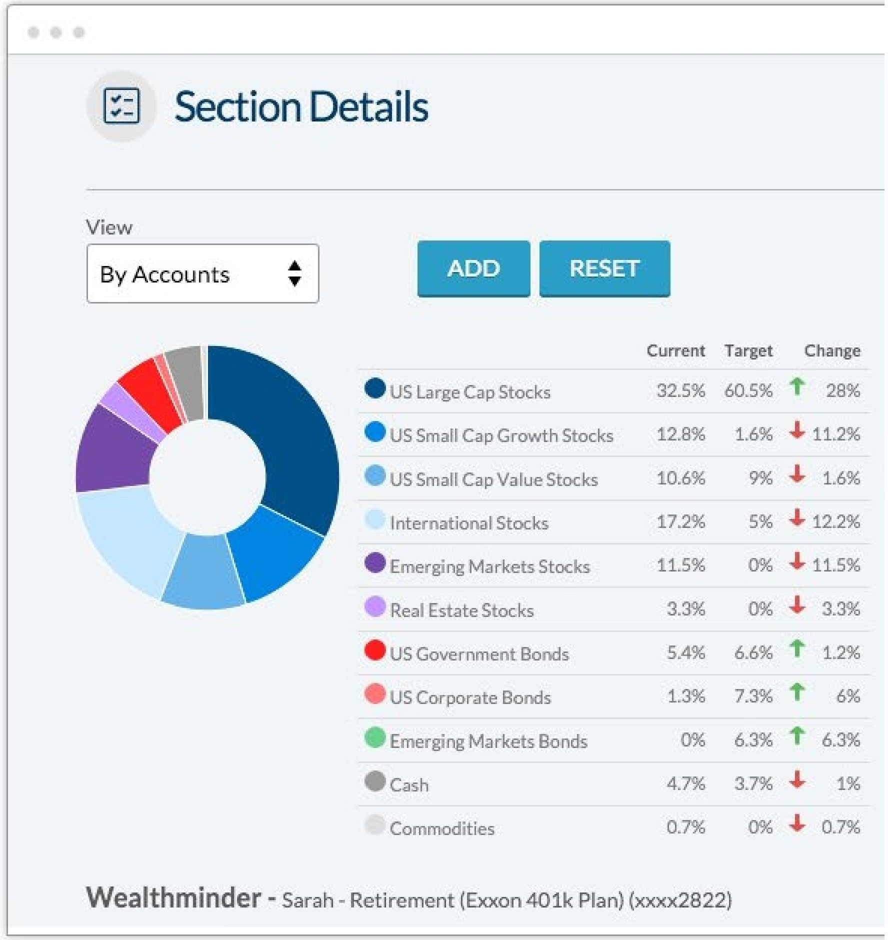


Account Aggregation

Powered by industry leader Yodlee, Wealthminder enables you to easily see all your clients' assets in a single location. Our engine classifies each security automatically, giving you a complete picture of a client's asset allocation.

Custom Investment Recommendations

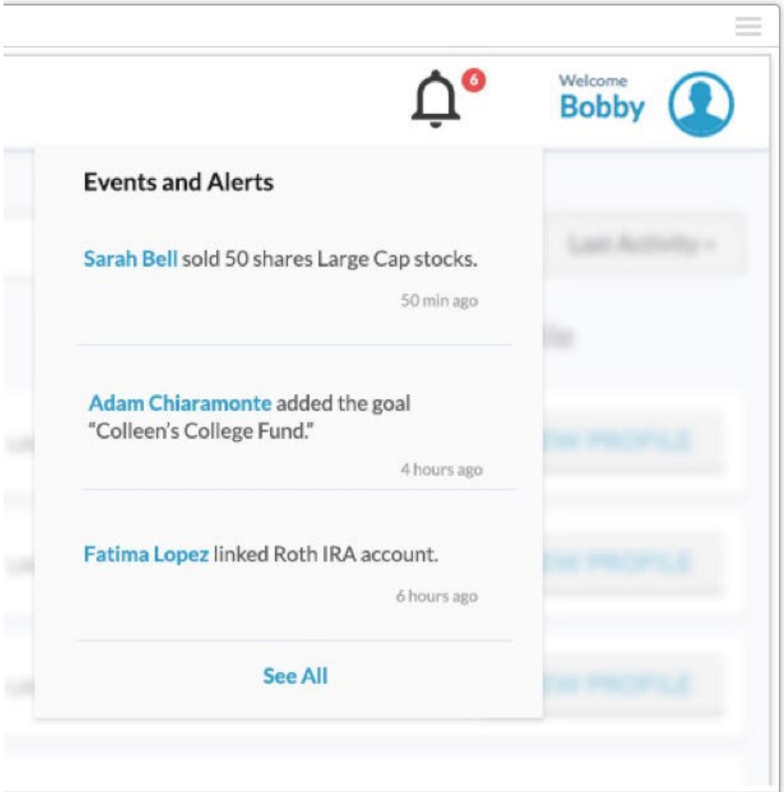
The Wealthminder engine gives you the flexibility to specify your own capital market assumptions, asset allocation models, glide paths and recommended



securities. Using this information, Wealthminder creates tax efficient portfolios that align with a client's objectives. In cases where an account has restricted investment choices (e.g., 401k plans), Wealthminder can adapt the recommendations to use the investments available in your client's plan.

Events and Alerts

With traditional wealth management software, you have to log in to every client's account to determine if there are opportunities or problems you need to



address. With Wealthminder's event and alerting system, you simply tell us what "events" you care about and we'll proactively notify you when there's a situation requiring your attention. Further, using Wealthminder action plan status, you can determine which clients have completed your recommendations and which need additional assistance.

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We promise to keep your information safe and secure.
Read our Safety & Security Promise »

Ready to get started? Request proposals for help with your financial concerns.

Get Started!

Log in

wealthminder

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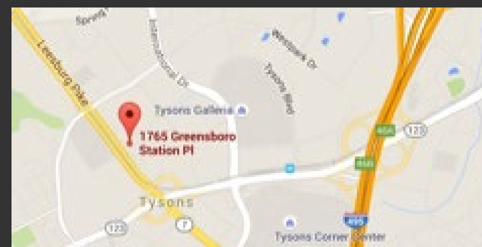

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