> WealthStation is by far the most powerful tool that we've had to collect information about our clients and store in one place. We can better understand their current needs and anticipate their future needs for many years to come which helps us provide the right solutions to them.

Rob McDade,
vice president financial & brokerage solutions,
COUNTRY Financial

SUNGARD

COUNTRY FINANCIAL CASE STUDY

WealthStation

COUNTRY Financial, a company with over 80 years of experience in financial planning and investment management, turned to SunGard's WealthStation solution to equip their financial representatives with a tool to help clients achieve financial security. With an emphasis on the relationship fostered through listening attentively and providing valuable and timely information from their team of experts, COUNTRY Financial provides clients with tangible and sustainable personalized financial security plans to help meet immediate needs today and build for the future, no matter their starting point. The desired solution needed to help strengthen the relationship with clients, enhance the flow of information to clients and allow for the integration of various financial security needs.

CHALLENGE

- Current resources did not maximize the financial advisor's productivity
- Significant time was spent explaining complex financial concepts to clients
- Maintained separate systems for the various product lines

SOLUTION

- Identified WealthStation as a viable solution to complement their long-term view, as well as their client-centric focus marked by a personal touch
- Chose to provide SunGard's WealthStation as a resource for their financial representatives
- Joined together various product lines systems
- Integrated the different financial security needs of their clients

RESULTS

- Helped increase advisor productivity, resulting in more one-on-one time spent building client relationships
- Provided a tool to simplify complex information, breaking it down in terms that advisors can easily explain and display to the client in a professional manner
- Provided advisors with a common understanding of clients and their needs through the integration of separate systems for various product lines
- Allowed simplification of the financial advice process, helping accelerate delivery out to the sales team and clients

For more information visit:
www.sungard.com/wealthstation