SUNGARD WEALTHSTATION

ON-DEMAND ACCESS FOR INDEPENDENT ADVISORS AND WEALTH MANAGERS

WealthStation's modular financial planning solution is designed to provide advisors with the tools to build specific plans based on their clients' needs and wants. This solution helps an advisor to be more productive and clearly communicate financial concepts through individual plans and reports. WealthStation helps advisors and wealth managers identify and quantify their clients' financial goals. In addition, it gives firms administrative control of system features, user access and permissions.

Broad Spectrum of Capabilities

WealthStation's software-as-a-service (SaaS) offering allows advisors to access WealthStation's capabilities on-demand by credit card. With WealthStation On-Demand, subscribing advisors have access to:

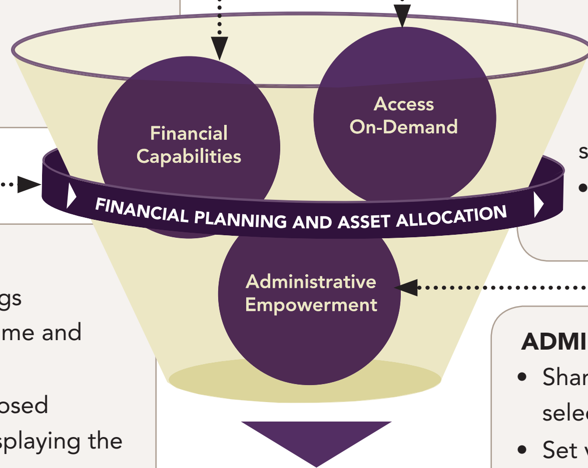
- More than 60 financial planning modules
- SunGard's asset allocation tool, AllocationMaster
- Automatic upgrades in a secure environment
- Full disaster recovery backup

FINANCIAL PLANNING, CONCEPTION AND COMMUNICATION CAPABILITY

- Comprehensive planning
- Monte Carlo simulation
- Goal-based planning
- Scenario planning

ON-DEMAND, WEB-BASED ACCESS

- Available through a SaaS delivery model
- Web-based tools that help reduce resources, time constraints and the infrastructure costs of large-scale implementations
- Access anytime, anywhere via an Internet connection



Advisor/Client Relationship

ASSET ALLOCATION

- Import clients' asset holdings information, helping save time and eliminate input errors
- Compare current and proposed asset allocations, clearly displaying the required rebalancing
- Search for any open-end mutual fund by its name, trading symbol or asset class, using the Asset Finder tool
- Access anytime, anywhere via an Internet connection

ADMINISTRATIVE CONTROL

- Share client information through selective teams
- Set variable parameters
- Specify disclaimer and "action checklist" text to be displayed on screen and in printed reports
- Access printed report plans for review purposes
- Access client and user information via administrative reports, including report generation histories, detailed user and client lists, and referral lists

WealthStation provides the tools to help advisors acquire, service and grow their client relationships.
Visit www.sungard.com/wealthstationondemand or contact SunGard today at 1-801-955-3169 or wssales@sungard.com to find out more about WealthStation On-Demand and how it can help benefit you, your firm and your clients.

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