# SUNGARD WEALTHSTATION

## MOBILE REPORT ACCESS

SunGard's WealthStation Mobile Report Access solution is designed to give advisors mobile access to their clients' WealthStation financial planning reports. Mobile access to reports from any location using a mobile computer tablet helps facilitate advisor/client collaboration. Most advisors prepare a comprehensive presentation package for client meetings by collecting and collating paper-based reports. WealthStation's Mobile Report Access solution helps reduce the need to print and carry paper-based reports, as well as associated resource and printing costs.

The Mobile Report Access solution is an application optimized for computer tablet devices. It allows advisors who have an existing WealthStation Financial Planning license and access to interactively discuss the financial topics they have analyzed, scenarios they have created and other relevant planning issues as needed, wherever they need to be discussed.

### TECHNICAL REQUIREMENTS

- Compatible with iPad
- iOS 3.2 or later
- An existing WealthStation Financial Planning license and access

The mobile application securely links to SunGard's WealthStation Financial Planning system and, once opened, the advisor can see a list of their most recently accessed clients and the total number of stored reports created for each. By selecting a client, the advisor generates a detailed view from which specific reports can be selected and opened. The Mobile Report Access solution also has search tools available, facilitating access to all available clients and reports.


For more information regarding WealthStation's Mobile Report Access solution, contact your SunGard account representative.