

Today's wealth management sector contains enormous opportunity. For organizations that deliver on the promise of effective, personalized service, the rewards can be great — including enhanced customer loyalty, differentiation of their business and an increased share of an industry on the rise. SunGard's WealthStation helps provide businesses with the tools needed to help enhance service, streamline processes, and achieve success in a competitive landscape.

An end-to-end wealth management solution with a Web 2.0 interface, WealthStation integrates systems and tools across the enterprise to create a seamless, front-to-back office platform that offers a clear client focus. WealthStation's technology helps streamline processes and improve productivity at banks, trust companies, brokerage firms, insurance companies and independent wealth management firms, ultimately helping people perform their jobs better, faster and more consistently. The application of automated workflows and advanced technology helps advisors find more time to concentrate on the most important part of the business: client relationships.

Extensible Based on Your Needs

WealthStation is a modular platform that can be configured with as few or as many capabilities as desired, with integration into your existing core systems. You can choose to deploy WealthStation to support one function or process, or as a complete, end-to-end solution for operations and communications. Either way, the system is designed to scale based on your business objectives and needs. Simply choose the level and depth of your WealthStation deployment's capability in:

- **Client Management** — WealthStation's account-centric, client-centric and householding capabilities support advisors' new sales and account management activities, while also allowing users to maximize data, and select how they view and report on information, receive alerts, and perform actions.
- **Data Aggregation** — In addition to integrating with SunGard's back-office and data solutions, WealthStation's open architecture and use of standard protocols simplifies integration with proprietary and third party systems and information sources.
- **Asset Allocation** — Supporting advisors in creating investment portfolios, WealthStation proposes asset allocations based upon client responses and company-defined scoring of the risk tolerance questionnaire. Users can then generate forecasts and simulation models for the target portfolios using tax-efficient optimization, and company or advisor-defined portfolios.
- **Financial Planning** — To help attract, retain and grow client assets, WealthStation offers more than 60 different financial planning modules that cover more than 20 concepts; from single-issue, goal-based planning to comprehensive cash flow planning, retirement income distributions, what-if modeling and Monte Carlo simulations.
- **Investment Management** — WealthStation's investment management features, including asset selection and proposal generation, provide advisors with the tools to create tailored plans based on each client's unique risk tolerances, goals and investment objectives.

- **Trading & Rebalancing** — WealthStation's trading and rebalancing capabilities offer advisors the ability to produce real-time buy or sell trade requests on demand or through a scheduled rebalancing process. In both cases, the portfolio can be realigned against a model as it drifts beyond established tolerance levels, generating trade alerts as appropriate.
- **Reporting** — Standard and customizable management and client reporting packages are available through WealthStation to provide consolidated and holistic views across data points accessed through the platform.
- **Compliance** — WealthStation's administrative suite and permission rights help you ensure that your users perform actions based on their entitlements only, staying within industry and firm compliance parameters.
- **Client Access** — For firms seeking to provide collaborative tools and online data access to its prospects and clients, WealthStation offers a controlled investor portal for selected financial planning, asset allocation and trading functions.

As your business grows, WealthStation's modular capabilities can grow and expand along with it by adding features. Unlike traditional or homegrown solutions, WealthStation feature rollouts and upgrades can be added directly to the advisor's desktop as needs arise. Additional services and tailored programming are also available. Should your business shift its wealth management model, SunGard can offer relevant services from discreet, critical workflow elements to a fully integrated, end-to-end suite, scaled to size and demand.

WealthStation is part of SunGard's full suite of end-to-end wealth management solutions, linking your front-office, middle-office and back-office systems. SunGard's end-to-end approach helps you maximize the sharing of information to mitigate information risk, and enable trade execution, reporting, accounting, planning, allocation, and integrated business workflows. WealthStation pulls vital tools and capabilities together for you into one, easy-to-use platform, so that you can concentrate on the most important part of your business — client relationships.

A New World with WealthStation

Picture it: A world where, on any given day, your advisors simply log in to one system, and a dashboard interface gives them a personalized snapshot of their clients, alerts, the markets, and other key elements relating to the business. Then, from that same system, your advisors also can access everything about, and for, their clients.

In that single-platform world, advisors have access to the tools they need to do their jobs, including financial planning, asset allocation, trading, investment management, and client information and relationship management tools. And those tools call upon the same source data, so that users can stay accurate, well informed and highly productive in their work.

SunGard's WealthStation is making that world a reality. ■