

## WEB SERVICES

### ***Giving firms the means to create their own, flexible graphical user interface to WealthStation's powerful tools***

SunGard's Web Services tool is designed for financial services firms who seek to expand their target markets across a wide array of distribution channels and need to leverage their financial planning tools throughout the enterprise. A broader, more flexible front-office tool that contains the most popular financial planning calculation engines in WealthStation, Web Services is used to create a graphical user interface (GUI) either in conjunction with WealthStation, or as a self-sufficient, standalone solution that does not require a WealthStation deployment.

## CREATING CONSISTENCY

The Web Services tool helps create consistency for advisors, no matter where they may be working — in the office or in the field. Whether working remotely or not, advisors need to have access to common tools and information in a familiar format. With Web Services, advisors provide the required inputs to their GUI, which allows them to take advantage of some of WealthStation's most powerful financial planning calculation engines anytime, anywhere via the Web:

- At Retirement Plus
- Education Funding
- Financial Statements
- Monte Carlo for Retirement Planning
- Monte Carlo for At Retirement Plus
- At Retirement Foundations
- Education Foundations
- Retirement Foundations
- Survivor Foundation

In addition, Web Services can be supplemented with optional data and print services that allow users to:

- Retrieve and store client/advisor data
- Access and print WealthStation's client reports
- Access Master Client Scenarios
- Use the admin consumer default report templates

Web Services provides portable access to features traditionally found only in the most robust stationary solution deployments.

## DELIVERING A STANDARD INTERFACE

Web Services delivers a software interface in a machine-processable format (specifically WSDL) over the Web, using Web service definition language (WSDL) or as application protocol interfaces (APIs). Other systems interact with it using SOAP messages, typically conveyed using HTTP with XML serialization, along with other Web-related standards. In addition, Financial Planning Web Services can be deployed across the enterprise to facilitate individual access to vital data when and where it is needed. When used as a WealthStation add-on, administration settings are accessible as well.

## LEARNING MORE

To learn more about Web Services and how it can benefit your firm, talk to your SunGard account representative.