

## WEALTHSTATION INVESTMENT MANAGEMENT

WealthStation provides one place to access all of your vital tools, including those needed to aid the investment management process. The tools delivered through WealthStation Investment Management help your firm provide active, personalized, portfolio management cost-effectively and consistently. WealthStation Investment Management combines client profiling, asset allocation, investment selection, proposal generation, portfolio comparison, trading and rebalancing tools together to help you be successful and efficient.

WealthStation's intuitive Web 2.0 interface helps make these tools even easier to access and use than ever before. Whether you approach a portfolio by client or by account, the ambicentric nature of the WealthStation platform can fulfill your need for clarity and focus. And WealthStation's flexible process workflows help support that focus in your daily activities.

### **Interconnected Tools and Information**

Many of the features of SunGard's planning, allocation, and trading products are now integrated in WealthStation Investment Management, providing you with a robust, integrated process for your profiling, allocation, proposal, and rebalancing needs. By bringing these capabilities into a single platform and integrating your clients' data, information and tools become truly interconnected. For example, as assets are allocated, that information is automatically available for incorporation in the manager search and proposal generation processes.

There is no need to log out, and then in to another system, or perform unnecessary manual tasks for importing and exporting account data. This sharing of information can help save time and streamline processes, so that you can concentrate on the most important part of the business — client relationships.

### **Build, Propose, Compare and Manage Client-Tailored Portfolios**

WealthStation Investment Management offers a centralized system for delivering asset management services, servicing existing clients and winning accounts more frequently. You receive faster, more efficient, more convenient access to pertinent client data. Through use of its robust proposals, reports and full-color, graphic presentation capabilities, WealthStation's portfolio management tools help facilitate client discussions and make gathering assets easier.

### **Dynamic Support Across the Investment Management Process**

By spanning the entire investment management process, WealthStation Investment Management helps dynamically support your day-to-day activities in:

- Client profiling
- Asset allocation
- Manager search and selection
- Proposal generation
- Portfolio comparison
- Investment policy generation
- Trading and rebalancing

With WealthStation, you gain single-platform access to tools that can be vital to your business. And having those tools at your fingertips can help you in your quest to provide excellence in client service. ■

Using the platform's powerful asset allocation engine, you can run an in-depth analysis to reach a proposed asset allocation strategy. After performing comparisons and analyses, you can implement your institution's models or modify the strategy at your discretion, based on a client's preference, and then execute rebalancing to make that final portfolio come to life.

With WealthStation Investment Management, you have single-platform access to multiple investment programs consisting of proprietary and third-party solutions, including overlay management programs, separate account managers, mutual funds and exchange traded funds, and securities. You can also quickly establish a managed account program for client portfolios with minimal internal development. WealthStation provides access to important product and manager information, providing you with the prospecting and servicing tools you need to gather assets.

WealthStation's sophisticated investment management and selection tools allow you to access investment programs and approved investment products, generating the information needed to create meaningful client proposals. An extension of client profiling and asset allocation, investment management and selection places the client at the heart of the process. It takes the valuable information garnered from a client conversation and allows you to review that client's current portfolio — while taking risk tolerance, investment objective, current portfolio positions, and stated investment constraints into consideration — before compiling and presenting any recommended changes or solutions.

You can generate client's investment policy statements in WealthStation to help facilitate your personal investment relationships with clients, as well as to document portfolio constraints and support enhanced compliance and risk management. The platform's system administration and entitlements feature also allows firms to set up organization-specific investment objectives and model allocations to help create consistency across client accounts. Default product choices by asset classes can be specified as well, expediting the process toward recommended solutions. For clients requiring customization, the platform allows you to refine the recommended manager choices, depending on your permission level.

### **Tools for Today and Tomorrow**

The tools included in WealthStation help you take a client from an initial profiling interview all the way through to the account opening process and beyond — helping you deliver ongoing service excellence. Whether a client needs to reallocate assets or investments, or needs easy-to-understand analyses of a current financial state, the tools available in WealthStation Investment Management help make your job easier. WealthStation is designed to provide the tools to help you be productive, while introducing a flexible platform for wealth management that can grow as your business grows.