AITE GROUP NAMES SUNGARD'S WEALTHSTATION AS BEST-IN-CLASS HIGH-NET-WORTH ADVISOR PLATFORM

Aite Group named SunGard's WealthStation Platform (http://www.sungard.com/wealthstation) wealth management technology solution as the Best-in-Class Complete Advisor for the high-net-worth and ultra-high net-worth segments in Aite Group's latest report, "Evaluating Wealth Management Advisor Platforms: Integrating the Front Office." The report analyzes the requirements in the wealth management front-office, defines the wealth management platform concept, and differentiates requirements and implementation strategies by platform type and wealth management client segment.

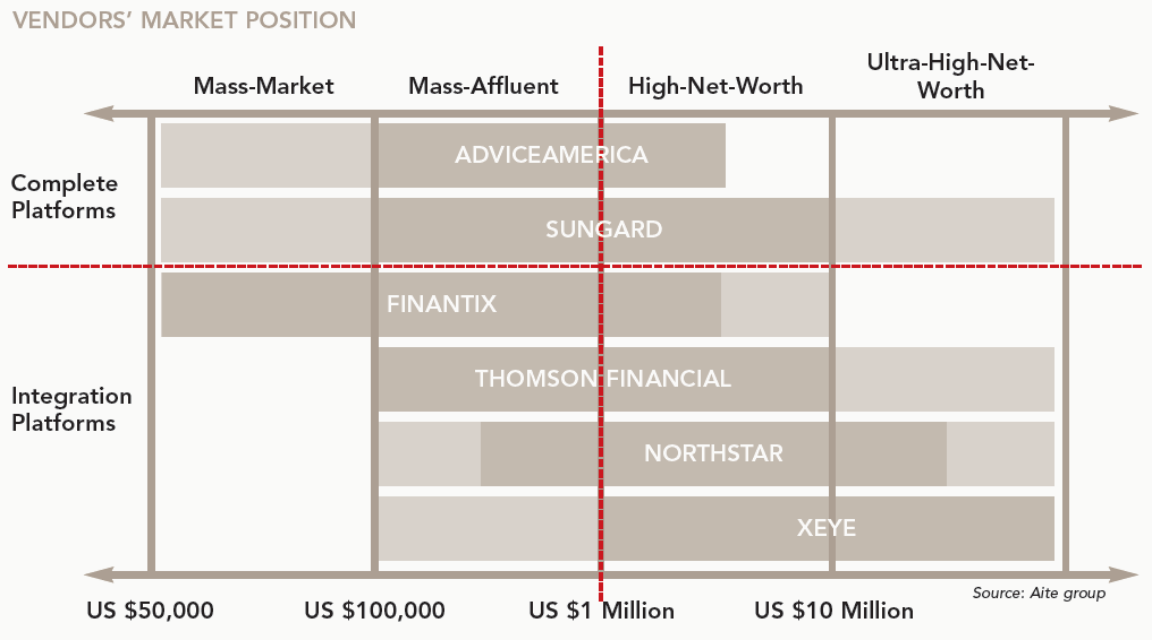
TABLE I: BEST-IN-CLASS AWARDS

PLATFORM TYPE	CLIENT SEGMENT	
	Mass-Market/ Mass-Affluent Segments	High-Net-Worth/Ultra-High-Net-Worth Segments
Complete Advisor Platforms	AdviceAmerica AdvisorVision	SunGard WealthStation
Front-Office Integration	Finantix OneWealth	Xeye WealthManager

Source: Aite group

Aite Group cited that SunGard's integration of PlanningStation and AllocationMaster, two best-of-breed solutions in their respective disciplines, were instrumental components in SunGard's ability to build a top-of-the-line wealth management platform. SunGard's Common Services Architecture facilitates a tight integration of these applications, not only on the user-interface level, but also on the data level. The financial planning modules within WealthStation offer advisors the flexibility to choose among several levels of complexity. In the area of investment planning, the recently released SunGard WealthStation 2.0 provides advanced functionality for unified managed accounts.

You can document client-specific investment policy statements in WealthStation to help facilitate your personal investment relationships with clients. 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. For clients requiring customization, the platform allows you to refine the recommended manager choices, depending on your permission level.



Alois Pirker, senior analyst at Aite Group and author of the report, said, "SunGard's WealthStation is particularly strong in risk analytics capabilities and support for investment product selection, while financial planning and investment planning remain the platform's core strengths. WealthStation provides support for several levels of planning, helping to make WealthStation advantageous for both the mass-affluent and the high-net-worth client segments. WealthStation also provides tight, out-of-the-box integration with SunGard's own back-office systems, including AddVantage, Global Plus, Charlotte and Phase3, while its integration with the newly acquired Automated Financial Systems solution will provide advanced trading tools and real-time, back-office interfaces."

About Aite Group, LLC

Aite Group is a leading independent research and advisory firm focused on business, technology and regulatory issues and their impact on the financial services industry. It was founded by leading industry experts in Banking and Securities & Investments. Aite Group brings together a team of business strategy, technology and regulatory experts to deliver comprehensive, timely, and actionable advice to financial institutions and technology vendors. It seeks to become a true partner, advisor, and catalyst by exchanging ideas and challenging basic assumptions to ensure that our clients always stay one step ahead of the competition. Visit Aite Group at www.aitegroup.com.

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