Client Information Center

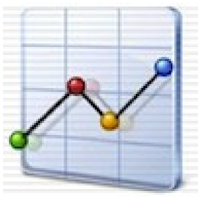
Client Information Center (CIC)

- Advisor branded
- Easy to use
- Accessible on most computing devices
- Secured
- Affordable

----- CIC Consists of Following Four Modules ----------

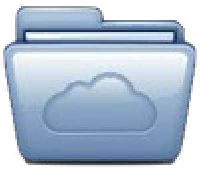
Personal Information

- Provides high quality information
- Saves time creating financial plans
- Better prepares for client meetings
- Integrates with multiple leading CRM s/w



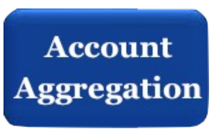
Reports From Adviser

- One click share of Wealth Planner financial plans with clients
- Ability to upload other reports (e.g. a performance report)
- Alerts and audit trail



Personal Documents

- Secured and easy access anywhere, anytime, via any device
- Ability to selectively share with the advisor
- Ability to send alerts
- Transmission of signed documents



Account Aggregation (Third Party Provider)

- Easy access of balance/positions data to:
    - Clients in CIC
    - Advisers in Wealth Planner™
- Latest information
- Seamless integration

If you would like more information or would like to schedule a full demonstration, please contact us….

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