

**Selecting the Right Solution:
The Application Designed
for Advisors by Advisors**



If you are managing advisors or managing clients, you know that the demands on Wealth Management professionals have never been higher. You are competing in a market where product access can no longer differentiate you, and where the relational quality of your service will be your true differentiator. And differentiate you must if your goal is to organically grow your business.

Directly linked with the challenges of growth are the demands of client management. You need an overall and cost-efficient solution which intuitively “understands” how the business and practice of wealth management works today, and how it must evolve in the future. You need a solution that will allow you to access and use client information quickly and easily.

Interactive Advisory Software (IAS) has built the FIRST and ONLY truly integrated wealth management delivery platform designed by advisors for advisors, and has over a decade’s worth of experience deploying wealth management platform solutions. From its inception the company has blazed the trail in database management, workflow automation, client access and robust financial planning. If you believe it is important for you to be both proactive and interactive with your clients – you need the IAS solution.

The Holistic Solution for the Holistic Advisor

Manage Your Practice

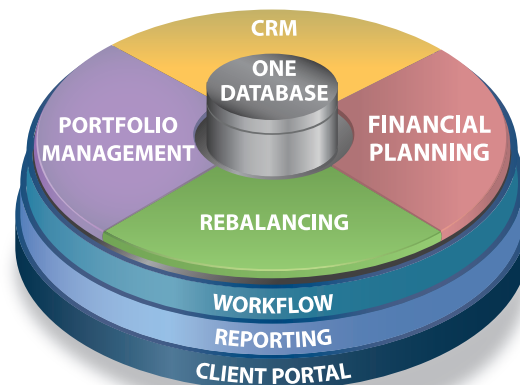
All of the client information you possess is in one location with IAS. Unlike many platforms that have been cobbled together from multiple solutions that rely on multiple databases, IAS’ wealth management platform is constructed around a single database. This allows you to manage your firm and your clients with a never before achieved level of efficiency. If it is part of the client’s financial world, you know it, and you can use it to service them at the highest possible levels.

Coupled with this, IAS has created a suite of solution tools that enable you to create custom solutions that benefit you, your advisors and your clients. By using IAS’ integrated workflow engine you can take all of the critical and time consuming aspects of your day-to-day world, and ensure that they are done quickly and consistently, every time. Activities such as:

- Onboarding new clients
- Establishing new accounts
- Responding to service inquiries
- Rebalancing and processing trades
- Preparing for client review meetings
- Being proactive with date sensitive data such as CDs maturing or term life policy expiring

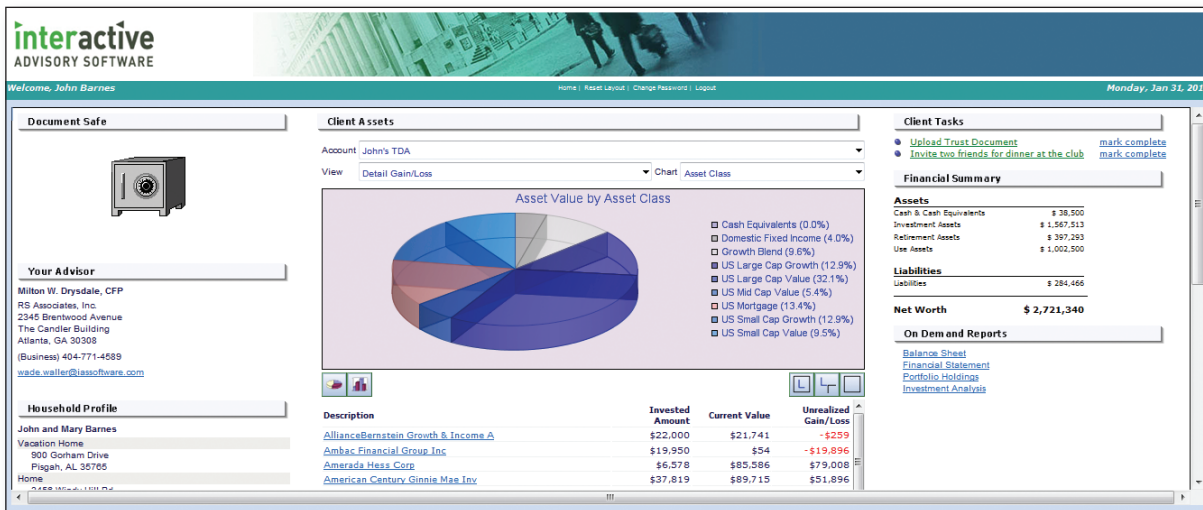
Manage Your Clients

The most critical issue with client management is what you know. The more you know about your clients, the better the chances are that you will provide service that is both credible and valuable. IAS provides a platform that gathers all client information into one database and makes it easily available for client relationship management (CRM), planning, risk analysis, portfolio management and any other wealth management activity the client needs and your firm provides.



Solution 360: Integrated Solution Platform

IAS’ integrated solution platform enables you to focus on expanding key services without increasing time, effort or expense. By consolidating and integrating key software services within your firm, IAS enables you to manage your client interactions from a single database view.



IAS Client Portal

The secure, web-based IAS Client Portal helps differentiate your firm by providing your client's access to their most current account information including account value and unrealized gains/losses as of the previous day's close of business.

IAS also enables your client to have easy online access to their information. This creates two significant benefits. First, the client's confidence is built by being able to rapidly and easily review their total or holistic financial status. Secondly, the advisor gets the "time back" that has traditionally been spent answering questions. If your firm's goal is to move from being a product focused organization to a holistic wealth management consulting firm, IAS is the platform that will get you there. The IAS platform is a truly transformational solution for your firm, your advisors, and your clients.

Low Impact Solution

Interactive Advisory Software brings all of the power and sophistication of its unified wealth management platform to enable you to focus on expanding key services without increasing time, effort or expense. All you need to effectively run the solution is a connection to the internet and a commitment to take your firm to its next evolutionary stage. Your information system, the life blood of your business, is being monitored 24/7 by professionals whose only focus is ensuring that you are operating at peak efficiency.

Solutions

The power of the unified database coupled with an integrated workflow engine can truly be seen in the delivery of the full suite of IAS' discrete product solutions. Each solution tool competes at the highest levels with other "single-purpose" applications. When those solutions are combined, they create a wealth management platform environment that is unrivaled in today's market.

Comprehensive Financial Planning

Interactive's financial planning module provides the holistic perspective you need to furnish your clients with expert advice on retirement and tax planning, educational and other goal funding, risk management, and estate planning. The sophisticated relational database contains client goals, tax and cash flow data, assets, liabilities, insurance, and other data being used to manage your clients' current and future wealth. In addition to the standard reports and analyses demanded of all financial planning software, IAS' module addresses the many "What If's" of financial planning.

Portfolio Management and Accounting

Interactive's portfolio management module puts powerful analytical tools at your fingertips. Offering the wealth management industry's broadest range of features for analysis, compliance, asset allocation, reporting and presentation, Interactive's portfolio management capabilities enable you to manage and transact in mutual funds, equities, fixed income, mortgage-backed securities and alternative investments – including partnerships and real estate.

CRM

Interactive's customer relationship management (CRM) module eases advisor's workload and builds loyalty with clients. Customer relationship management tools deliver the power to transition seamlessly between a client's detailed balance sheet and account data. This is a benefit unavailable with standalone CRM modules. Features available within the system include practice intelligence, client and advisor access, practice management and compliance support.

Reconciliation

Interactive's data reconciliation module cuts back-office costs and boosts efficiency. The robust data reconciliation service allows you to put an end to expensive, inefficient back office routines; freeing you to do what you really want to do—attend to your clients' needs.

IAS is Committed to Your Satisfaction

Dedicated to providing you the highest level of service, IAS has an award-winning team of professionals committed to satisfying your every need. From sales to support, our team is focused on increasing your satisfaction and providing software solutions that help you achieve your firm's goals. Call us today at 877.572.6105, or visit us at www.IASsoftware.com and we will have you up and running on IAS in no time.

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