Navigating AdvisorEnterprise℠ 2.0

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NFP Advisor Services Group

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Video

Support

- Christian O'Connor – AVP, Advisory Services
  - High net worth consultation
  - Platform conversion & guidance
  - Firm visits
- Advisory & Investment Services (AIS) Consulting
  - Independent guidance
  - Multiple product line consultation
- Advisory Support
  - Platform operations expertise
  - Service request assistance
  - Rep as Manager trading

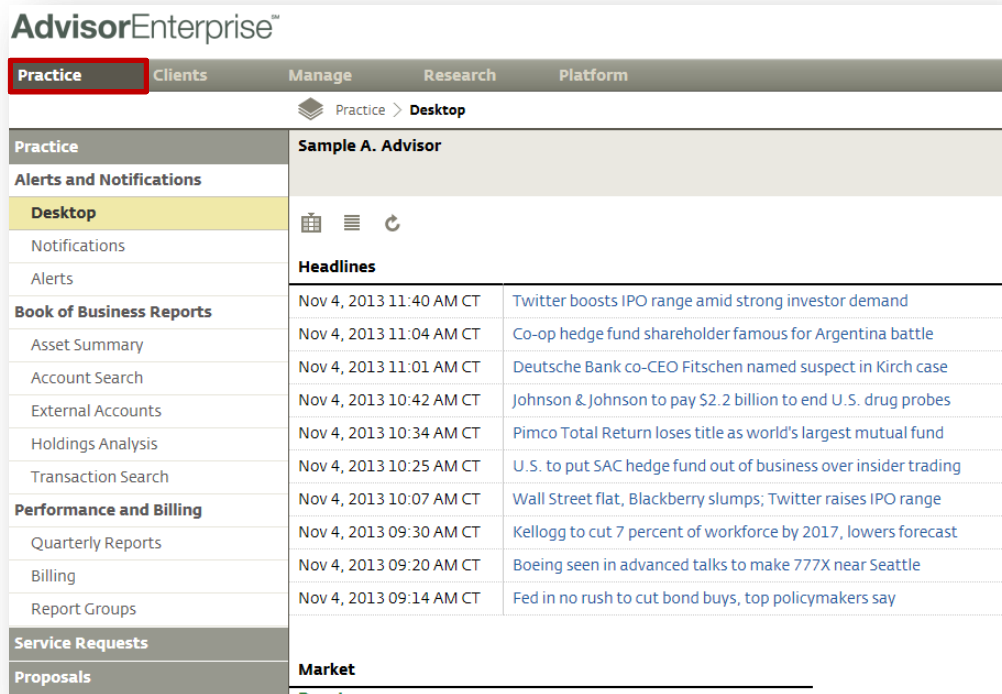
Introducing the Next Generation Platform

AdvisorEnterprise 2.0

- Tablet accessibility
- Symbols-based icons
- New client meeting portal
- Institutional-quality proposal output
- Enhanced reports
- Proposal enhancements
- More intuitive navigation

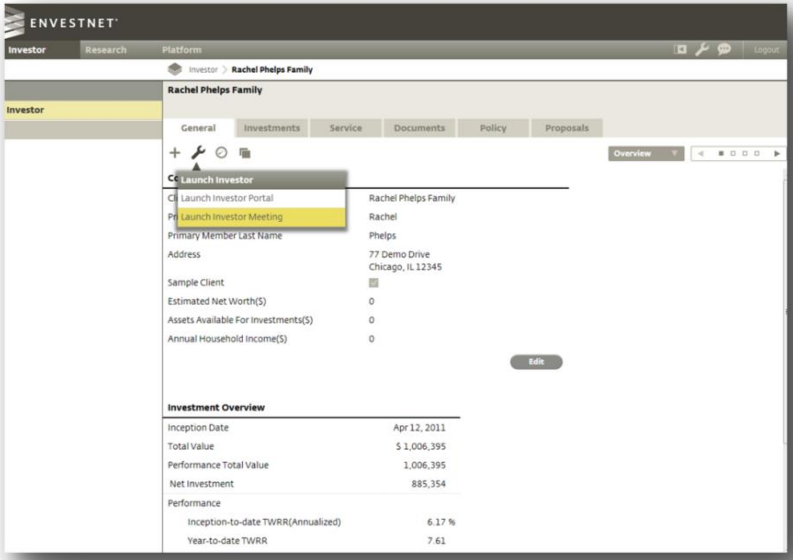
Practice

- Practice
  - Alerts and notifications
  - Book of business reports
  - Performance and billing
- Service requests
- Proposals
- Demo



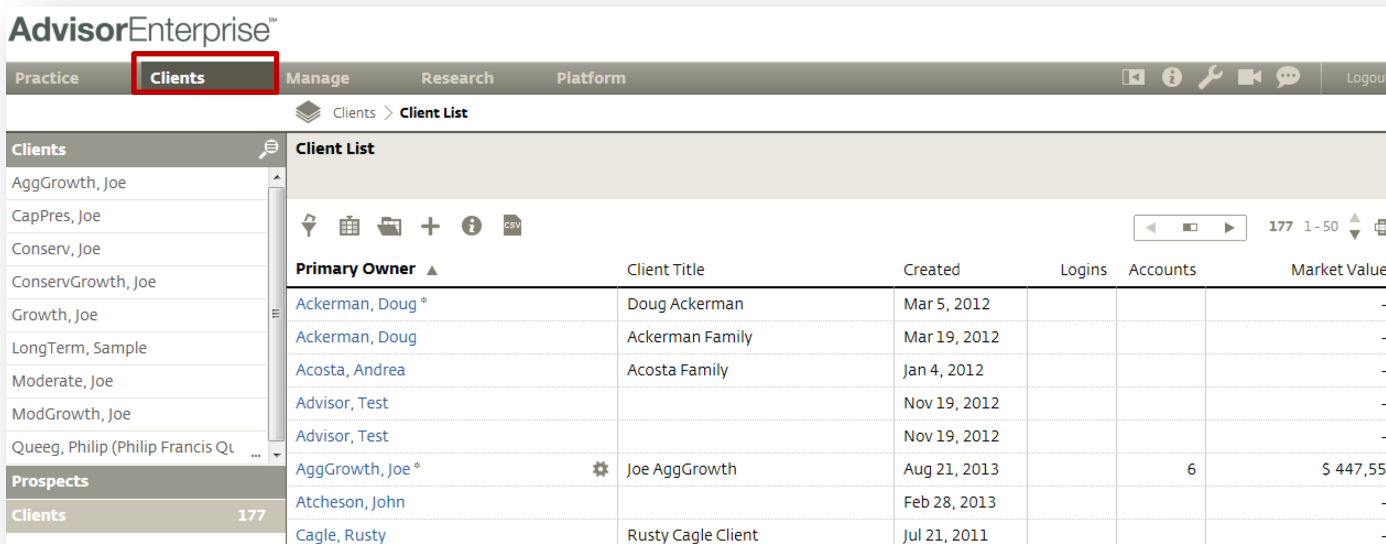
Client Meeting Portal

- Launch investor portal from tablet device
- Secure access to information for that specific client
  - Proposals
  - Reports
  - Documents



Clients

- Client
- Prospects
- Demo

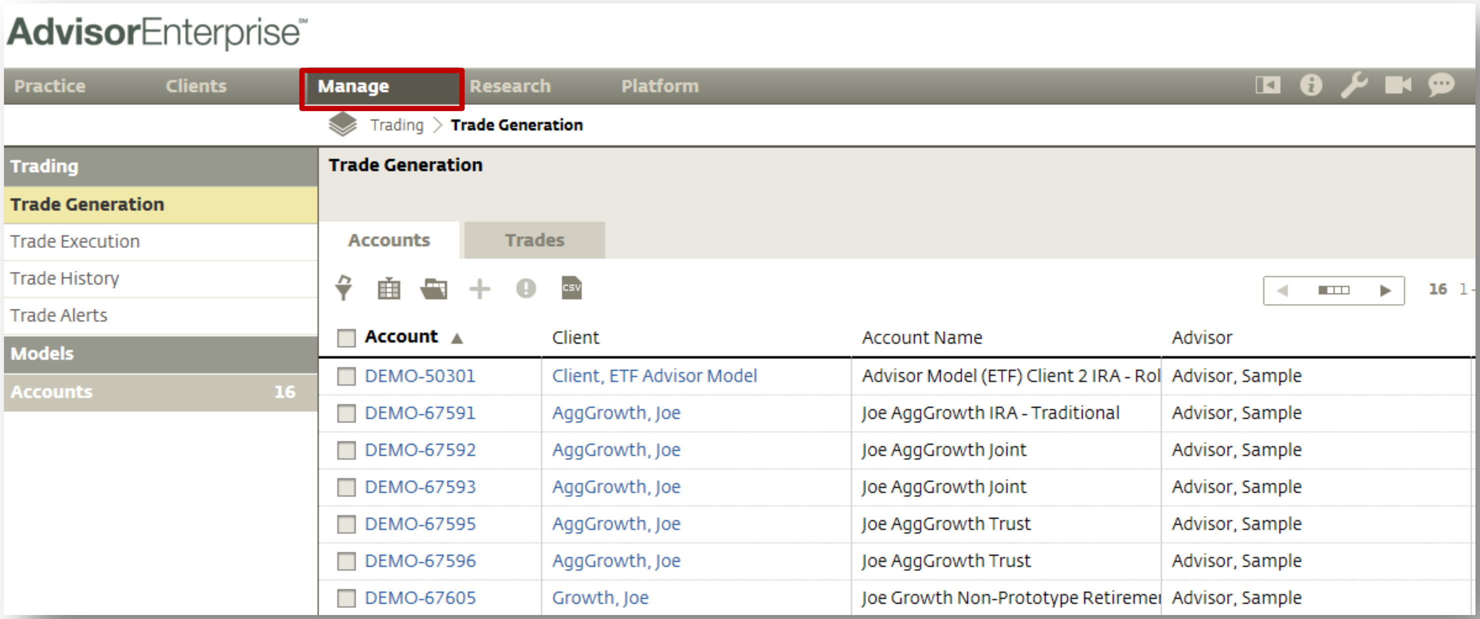


Institutional Quality Proposal Output

- Featuring new FINRA-reviewed proposal
- Comparison of current vs. proposed
- Additional analytics
  - Annualized returns
  - Up-side/down-side capture

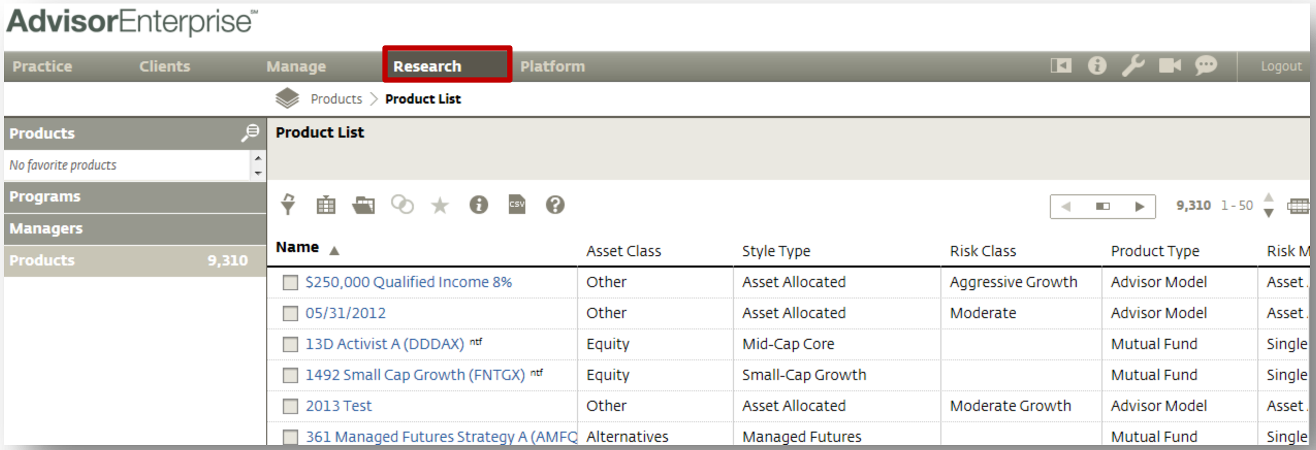
Manage

- Trading
- Models



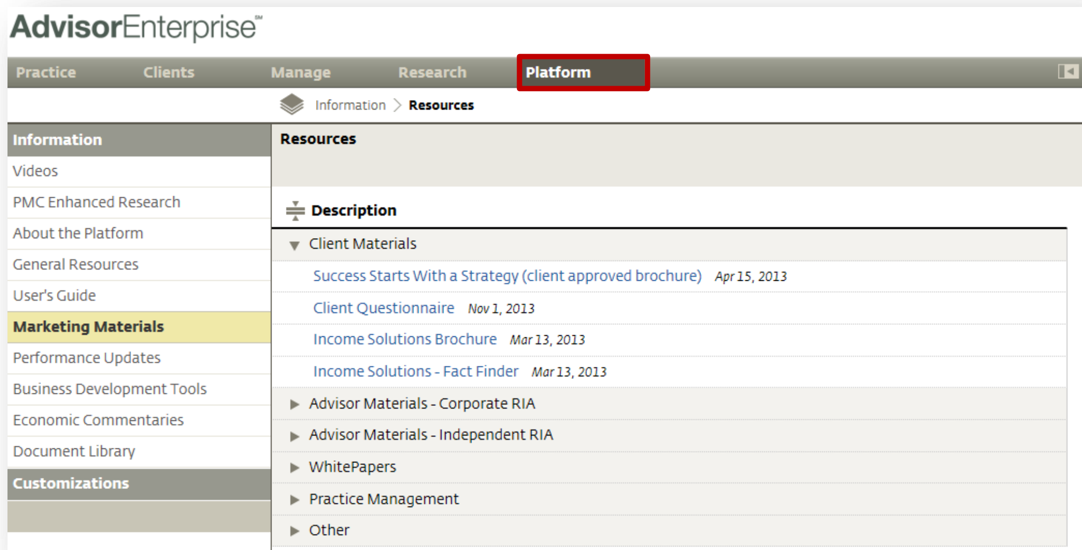
Research

- Products
- Programs
- Managers
- Demo



Platform

- Information
- Customizations
- Demo



Resources Available

- Live training calls
- Fact sheets
- Videos on demand
- AdvisorEnterprise 2.0 manual

Support

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Advisory & Investment Services Consulting

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Advisory Support

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The Future of AdvisorEnterprise 2.0

- More flexible UMA
- Model composites
- Portfolio attribution analysis
- eSignature
- Expanded integration with AdvisorComplete℠
  - Alerts
  - Manager data in dashboard