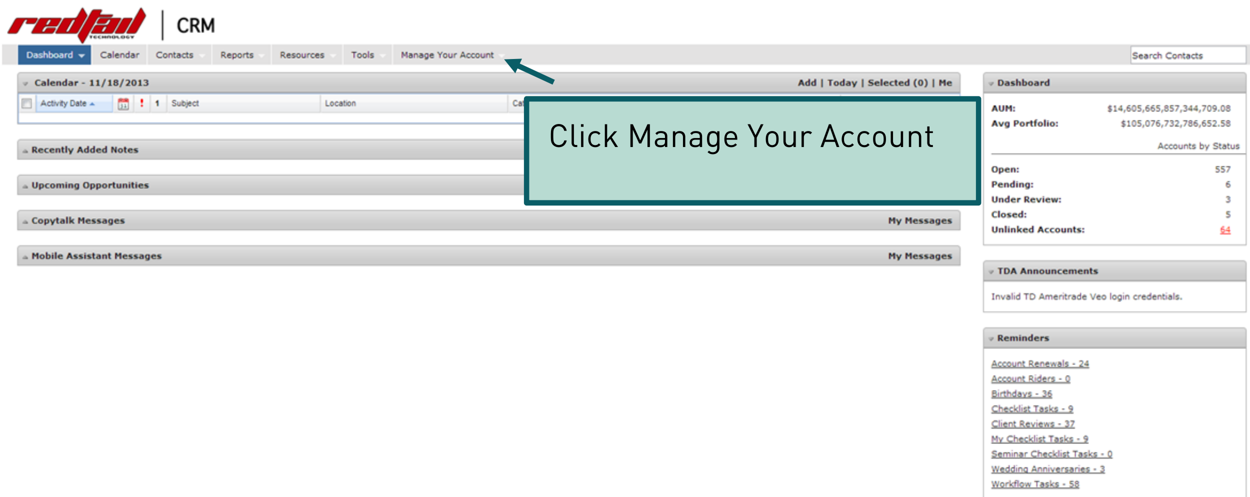
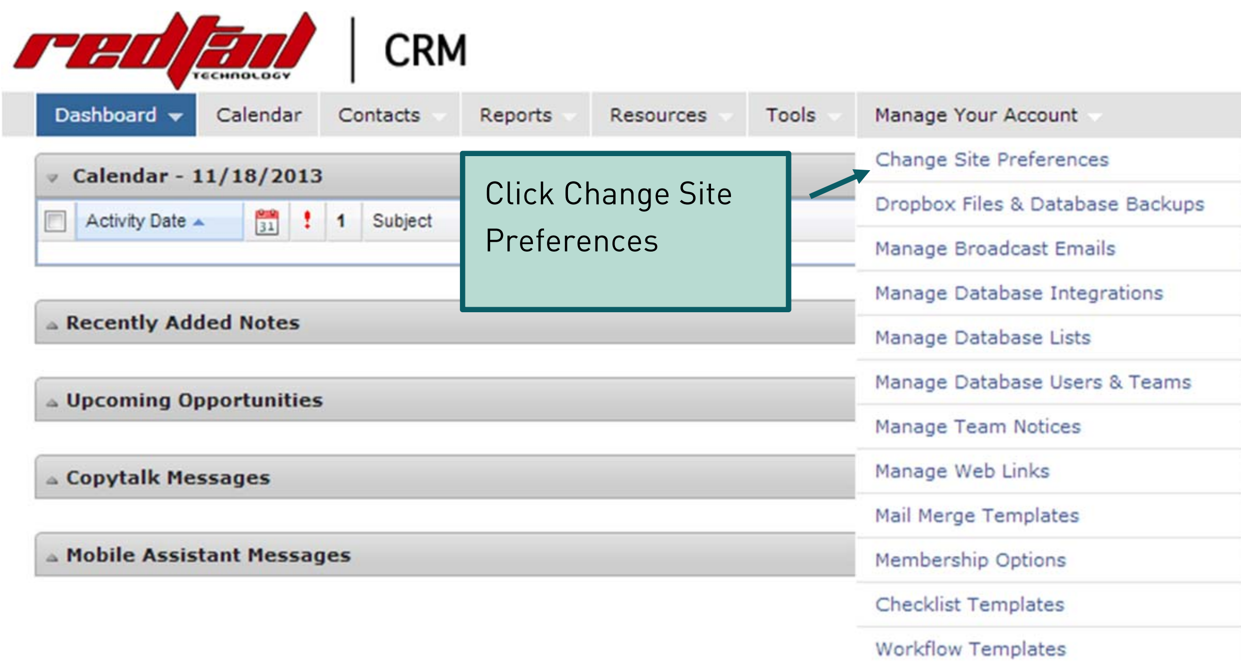
ADVISORYWORLD
FINANCIAL TECHNOLOGY

SCANalytics

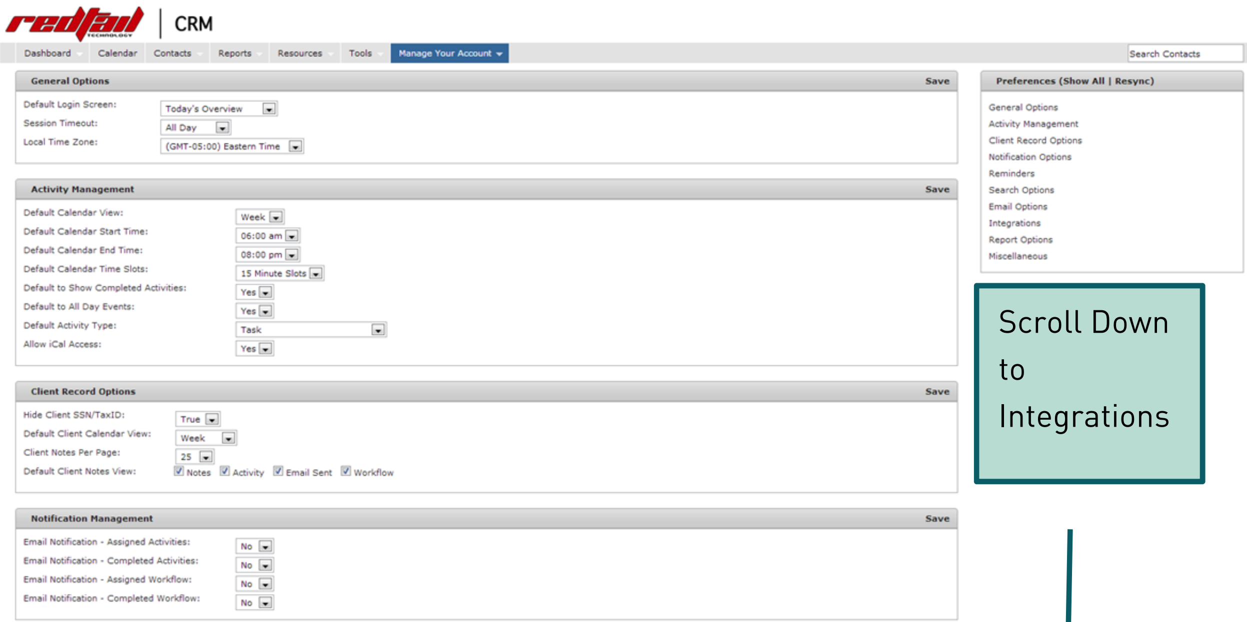
How to: Setup Redtail Integration

redtail
TECHNOLOGY


CRM
Dashboard
Calendar
Contacts
Reports
Resources
Tools
Manage Your Account
Search Contacts
Calendar - 11/18/2013
Add | Today | Selected (0) | Me
Activity Date
Subject
Location
Click Manage Your Account
Dashboard
AUM: $14,605,665,857,344,709.08
Avg Portfolio: $105,076,732,786,652.58
Accounts by Status
Open: 557
Pending: 6
Under Review: 3
Closed: 5
Unlinked Accounts: 64
Recently Added Notes
Upcoming Opportunities
Copytalk Messages
My Messages
Mobile Assistant Messages
My Messages
TDA Announcements
Invalid TD Ameritrade Veo login credentials.
Reminders
Account Renewals - 24
Account Riders - 0
Birthdays - 36
Checklist Tasks - 9
Client Reviews - 37
My Checklist Tasks - 9
Seminar Checklist Tasks - 0
Wedding Anniversaries - 3
Workflow Tasks - 58

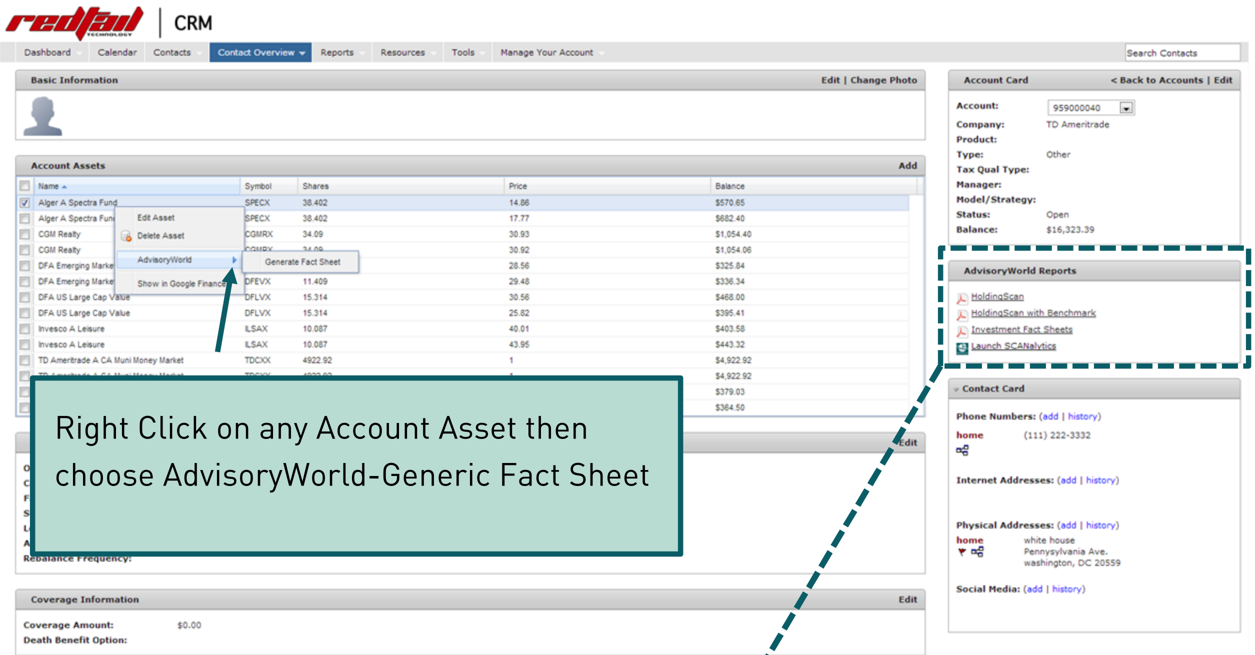

CRM
Dashboard
Calendar
Contacts
Reports
Resources
Tools
Manage Your Account
Calendar - 11/18/2013
Activity Date
Subject
Click Change Site Preferences
Change Site Preferences
Dropbox Files & Database Backups
Manage Broadcast Emails
Manage Database Integrations
Manage Database Lists
Manage Database Users & Teams
Manage Team Notices
Manage Web Links
Mail Merge Templates
Membership Options
Checklist Templates
Workflow Templates
Recently Added Notes
Upcoming Opportunities
Copytalk Messages
Mobile Assistant Messages

ADVISORYWORLD
FINANCIAL TECHNOLOGY

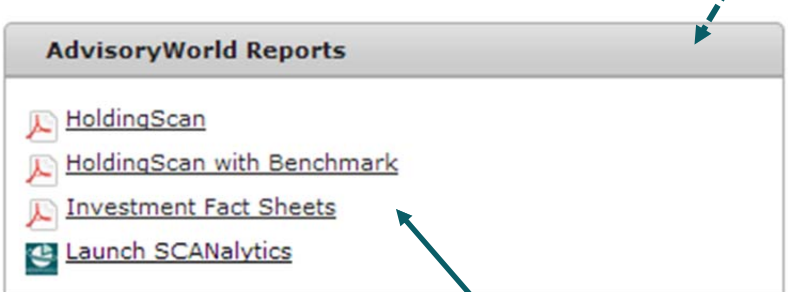


Scroll Down to Integrations

Enter your AdvisoryWorld Username and your Last Name, then press Save



Right Click on any Account Asset then choose AdvisoryWorld-Generic Fact Sheet



Click HoldingScan (Account Report), HoldingScan with Benchmark (Account Report with performance compared to a benchmark), Investment Fact Sheets (1 Page Sheets for all Account Holdings) or Launch SCANalytics to seamlessly login to AdvisoryWorld's app.