ADVISORYWORLD FINANCIAL TECHNOLOGY

SCANalytics Portfolio Analysis and Investment Planning App

Portfolio Research Reports & Proposals

Generate Portfolio & Investment Analytics including Hypothetical vs. Actual Performance based Risk vs. Return and MPT statistics such as Alpha, Beta, R^2, Sharpe Ratio, Up and Down Market Capture, Information Ratio and more.

Review asset allocation and correlation for diversification insight as well as equity and fixed income metrics for indications as to growth vs. value tilt and interest rate exposure.

Integration

Seamlessly Import Client, Account and Positional Data from leading Portfolio Management, Planning & CRM applications such as Albridge Wealth Reporting, Orion Advisor, WealthVision, Salesforce and Redtail.

Compare your own Custom Model Allocations vs. a Client or Prospect Account Allocation with the CompariScan Proposal.

ALBRIDGE® AN AFFILIATE OF PERSHING

ORION ADVISOR SERVICES, LLC

WealthVision℠ Powered by eMoney

redtail TECHNOLOGY

salesforce™ for Wealth Management

blueleaf

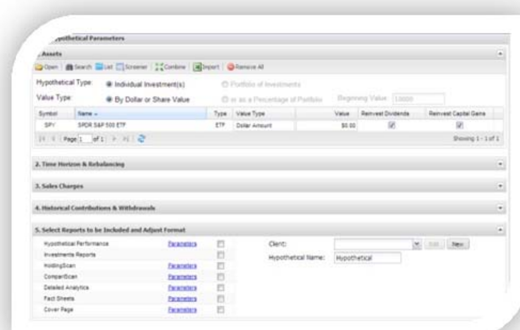
Model Allocation and Performance Analysis

Access, Analyze and Compare Models.

LPL Research Recommended Models: SAM, OMP, MWP, ETP

Blend Model Allocations and Historical Model Performance and create "Models of Models."

- Historical Allocation Change and Trade Support
- Mutual Fund, ETF, Closed End Fund, Stock, SMA, Variable Annuity, Bond and Index Research Data
- Efficient Frontier Optimization
- Returns Based Style Analysis
- Monte Carlo Simulation



LPL Financial

Visit advisoryworld.com for more information or contact sales@advisoryworld.com 800-480-3888

Differentiate your portfolio analytics and investment planning offering with highly customizable reports. Enjoy using this intuitive application which features seamless integration with leading Portfolio Management & CRM applications. Join the elite team of successful advisors making the switch to our value-added alternative to Morningstar.

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Key Features & Benefits

- Back-test Portfolios for Proposal, Periodic Review and Suitability Purposes
  - View Risk, Return and essential MPT Statistics of Current and Proposed Portfolios
- Demonstrate how hypothetical investment landscape changes would have affected Portfolios
  - Assess the impact of variables such as Taxes, Fees, Inflation, Cash Flows and Rebalancing
- Clearly illustrate portfolio diversification and value investing
  - Analyze Equity, Fixed Income, Region, Sector and Overlap characteristics on the HoldingScan report
- CompariScan Proposal Generation
  - Compare two Portfolios, Models and/or Investments side-by-side
- Save time and eliminate data entry errors through Integration
  - Import Client Account and Position Information accessed from Albridge Wealth Reporting, Orion Advisor, WealthVision powered by eMoney, Blueleaf, Salesforce, Redtail and more.

Differentiating Factors

- *Enhance Client Presentations with Customizable Reports*
  - Look & Feel: Easily modify logos and branding
- *Improve Efficiency with Automated Workflows*
  - Integration: Albridge Wealth Reporting, Orion Advisor, eMoney, Salesforce, Redtail and more.
  - Import portfolios from Microsoft Excel and assess allocation changes
  - Speed: Build and Analyze a Portfolio Much Faster than with Morningstar Workstation and Office.
    - Our app is faster, period.
- *A Proven Support Model*
  - We pride ourselves in our successful training program which includes webinars, videos, documentation and on-site presentations. Our customer service sets us apart.
- *Price*
  - Discount available for LPL Advisors

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