

Partner with EISI to Configure an Advice Management Solution to Fit Your Business Needs

Advice Fusion gives your firm access to the industry's most comprehensive suite of advice delivery resources. A dedicated team of professionals at EISI will work with you to tailor a solution to your needs.

A collaborative approach

EISI partners with clients to design, plan, and implement a tailored solution. Your firm's Advice Fusion deployment can be phased-in, using some or all of its components, to meet your short- and long-term business objectives. EISI follows a disciplined project management process throughout each phase of the project. Afterwards, a dedicated Relationship Manager works closely with your firm to ensure continued value.

Flexible deployment options

EISI supports two deployment options - application service provider (ASP) and enterprise-hosted. In the ASP environment, data is stored on servers that are hosted and maintained in a secure third-party data center protected by advanced physical and electronic security systems. For enterprise-hosted deployments,

Advice Fusion components smoothly integrate with your existing applications, technology environment, and security infrastructure.

Comprehensive training and support services

A professionally-developed training program, which is designed to progressively improve users' skills, is available in self-study and instructor-led formats for Advice Fusion planning solutions. As well, your firm can leverage EISI's experience in customizing user training and Train-the-Trainer programs.

The EISI Help Desk provides both operational and functional support for Profiles and NaviPlan software, and is available on a first-line and second-line support basis. EISI's Technical Support Specialists may be reached via toll-free telephone, and via EISI User Services, which is a secure customer Web portal.

ADVICE fusion

EISI's Advice Management Suite

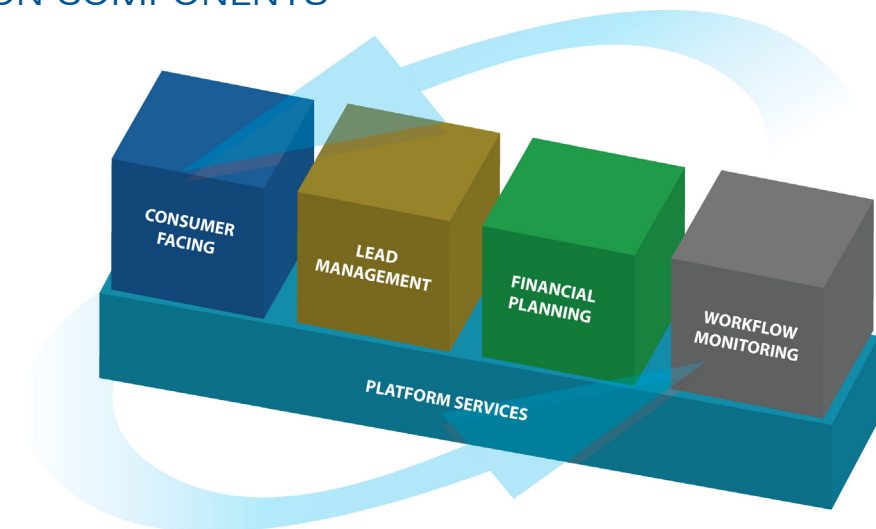
EISI's Advice Fusion is a suite of products and services that enables financial services firms to fully leverage their technology investment by integrating all aspects of advice delivery.

Connect and automate the entire planning and advice delivery process:

- Provide a rich, unique customer experience that is consistent across all channels of your organization
- Facilitate data sharing and collaboration between clients, advisors, call centers, specialists, management, and compliance professionals
- Leverage the industry's leading financial planning tools to increase product sales and client satisfaction

ADVICE FUSION COMPONENTS

Advice Fusion components can be implemented individually or as a fully-integrated solution.



Tap into EISI's

Experience and Expertise

We'll help you identify areas to gain efficiencies, maximize ROI, and improve customer service.

Our established processes and demonstrated ability to deliver and support tailored solutions make EISI the best financial planning technology partner for your investment.



View an Advice Fusion demo: www.eisi.com/advicefusion | Contact us: sales@eisi.com

Industry-leading software. Incomparable service. Unrivaled scale.



EISI, developer of NaviPlan and Profiles software, offers the broadest selection of needs-assessment and financial planning tools in North America. Industry-leading software, combined with incomparable service and unrivaled scale, makes EISI the technology partner of choice for more than 250,000 financial professionals.

ADVICE FUSION COMPONENTS



LEAD GENERATION

Attract prospects and generate qualified leads

The consumer-facing solution is a self-service tool that engages your Web site visitors in an assessment of their financial situation and introduces your firm's unique offering. Its interactive design allows for easy data entry, then instantly returns results and options that are generated by either the NaviPlan or Profiles calculation engine. Your firm's clear call to action, along with easy access to experts, motivates clients to opt in for professional advice.



LEAD MANAGEMENT

Effectively manage leads and opportunities

All opt-in data collected by the consumer-facing solution is accessible in the lead management tool in either a centralized or distributed view. In a centralized view, leads are reviewed and assigned to advisors. Using a distributed view, advisors can assess and accept leads, then automatically pass the data to either Profiles or NaviPlan financial planning software. Your firm can easily monitor progress as leads move through the planning process.



PLANNING, PRODUCT SALES, AND CUSTOMER SERVICE

Convert leads and increase share of wallet

Client files and draft plans created in Profiles and NaviPlan are used by your advisors as a springboard to broader, more profitable advice-based relationships. The software is designed to help advisors quickly address clients' questions, explore planning opportunities, and propose solutions. Draft plans can be seamlessly passed to approvers for review.



PLAN APPROVAL AND COMPLIANCE

Automate plan approval and ensure quality and suitability for clients

The workflow monitoring tool presents a consolidated view of financial plans in all stages of the planning process. Your managers and compliance professionals can search, sort, and filter data and efficiently access client reports and plan history information. Plans can be approved or rejected with notes from the reviewer.



COLLABORATION, WORKFLOW, INTEGRATION, AND MANAGEMENT REPORTING

Gain efficiencies across the organization

Platform services in Advice Fusion enable your firm to maximize the return on your technology investment.

- Collaboration - manage permissions and access rights to client files and plans for advisors, assistants, managers, compliance, and business users
- Workflow - automatically enforce business rules as a plan moves through the approval process
- Integration - consolidate information from Advice Fusion tools and facilitate integration with data sources, portal pages, third-party applications, and security features
- Management reporting - effectively track and report on system usage, advisors, clients, cases, and client data within plans