

Advent
OnDemandSM

PRODUCT BRIEF

Attract and Retain Top Advisors with a Premium Portfolio Management and Reporting Solution

Independent broker-dealers face unprecedented opportunities and challenges in today's fast changing marketplace. The ranks of fee-based investment advisors are expected to grow, as more and more of them recognize the advantages of independence and leave the confines of traditional wirehouses. And while this growing trend represents a real growth opportunity for broker-dealers, the competition for top advisors is fierce.

Success in recruiting and retaining top-producing advisors will go to those broker-dealers who can meet their increasingly sophisticated technology requirements. Yet technology demands can put pressure on already tight margins. How can a broker-dealer provide a platform that satisfies advisors and their clients without further eroding profitability?

Advent OnDemand: The Outsourced Solution

Today a growing number of broker-dealers are finding the answer in Advent OnDemand.SM Through Advent OnDemand you gain access to Advent's industry-leading portfolio management and reporting solutions delivered through the SaaS model, eliminating the expense of installing, maintaining, and supporting an in-house system. And Advent experts perform your back office reconciliation and data management functions, freeing you to focus on managing your business and servicing your advisors.

Meeting Advisor and Investor Needs

Investors today require more information and accountability from their advisors, and advisors need to be equipped to respond. Increasingly, successful advisors will align with broker-dealers who can help them provide timely, accurate, detailed, and often customized reporting.

With Advent OnDemand, broker-dealers can provide the robust reporting available through Advent Portfolio Exchange[®] (APX), the industry's most advanced portfolio management solution, on an out-sourced basis.



APX provides:

- ▶ Industry-leading reporting and compliance benefits that can only come from a fully transaction-based accounting solution.
- ▶ Integrated CRM and portfolio management that provides fast access to critical information for client servicing.
- ▶ Sophisticated client facing, decision support, fixed income, and performance measurement reporting capabilities included in a library of standard reports with additional customization available.
- ▶ The strength of the Advent Custodial Data network, which provides direct access to more than 500 custodians, brokers and trust platforms.

A Platform for Growth

Independent advisors increasingly look to technology to enable them to grow and scale their business while providing quality service to high net worth clients. APX through Advent OnDemand offers virtually unlimited scalability to take on more advisors, portfolios, and client assets without straining capacity or compromising quality. By enabling your advisors to grow their business, yours grows along with them.

The Outsourcing Advantage

Advent OnDemand allows you to utilize Advent's powerful technology on an outsourced basis, which delivers critical advantages, including:

- ▶ Minimal upfront investment in hardware
- ▶ Ease of implementation
- ▶ Reduced operations and IT staff requirements
- ▶ Reduced data costs
- ▶ Access from any desktop and offsite data backup for disaster recovery and business continuity
- ▶ A dedicated support team that understands our software, the industry, and your business

With Advent maintaining your system and your data, you can devote your valuable time to building your business instead of managing a technology infrastructure.

Remember, not all outsourced systems are alike. As part of the comprehensive Advent suite of investment management software solutions, Advent OnDemand gives you a clear migration path as your business grows and your product needs change. And it is backed by over a quarter century of expertise and innovation.

Gain a Competitive Edge

Advent OnDemand allows you to provide the advanced technology platform and comprehensive, high quality reporting that independent advisors demand. With Advent OnDemand, you'll be better positioned to grow your advisor network and demonstrate your commitment to your top producers already on board—all while streamlining operations, minimizing your IT burden, and controlling costs.

As competition among broker-dealers heats up, give yourself an edge. Contact Advent today to learn more about the advantages of Advent OnDemand.

About Advent

Advent Software, Inc., a global firm, has provided trusted solutions to the world's leading financial professionals since 1983. Firms in 50 countries rely on Advent technology to run their mission-critical operations. Advent's quality software, data, services, and tools enable financial professionals to improve service and communication to their clients, allowing them to grow their business while controlling costs. Advent is the only financial services software company to be awarded the Service Capability and Performance certification for its service and support organizations.



Find out more:
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