

Thomson ONE Retail Wealth Management Configuration Options

KEY BENEFITS:

We recognize that your firm has its own distinct selling style and corporate branding strategy. The Thomson ONE platform can be customized and configured to meet your specific needs.

Choose to Configure the Following Content:

Questionnaire	Incorporate your firm specific time horizon and risk tolerance questionnaire, or use our standard questionnaire developed by Financeware, Inc.
Preferred List of Mutual Funds, Variable Annuities and/or Stock	Highlight your preferred lists throughout the planning process, and develop models for your advisors based on the preferred list or current marketing initiatives.
Asset Classes	Thomson ONE automatically classifies every security in the application providing consistency across all users. Use either firm defined asset classes or those we have developed in partnership with Financeware, Inc.
Risk Categories	Classify each investor into a risk category consistent with their investment objectives based on answers in the questionnaire. Determine your advisors ability to override the classifications to insure the suitability of investment selections.
Model Portfolios	Use the model portfolios Financeware, Inc. has developed based on the efficient frontier, or include firm defined model portfolios that may be updated quarterly.
Disclosures	Your compliance department may choose to add or modify our existing disclosure pages.
Help & Tips	Your firm has the option to include an almost unlimited array of page specific customized drop down menus that can include help, tips, selling advice, compliance requirements or other information driving firm wide consistency standards.
Choose to Customize the	Customize the banner that appears across the top of the screen to create a similar look and feel to your Intra- or Internet site.
Report Cover Page Logo	The home page is the first page an advisor will see when they log in to the application. Add your firm's logo, unique marketing message or other firm specific content.

For more information please contact us:

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