WealthStation Trading Gold

Legent Clearing offers WealthStation Trading - a powerful front-office solution with extensive functionality.

This fully customized, comprehensive front-office solution provides financial professionals with innovative functionality. The gold package offers customized reporting and advanced trading capabilities. This robust, browser-based front-office solution helps empower financial professionals by offering the key features they need to truly service their clients and grow their businesses.

Gold Package Featured Functionality:

Reports: Financial professionals can build customized reports easily and quickly. By creating reports, financial professionals can use immediate information to strategize and help drive revenue.

- Commissions report
- Stock record report
- Open orders report
- Activity report
- Trade blotter
- Advanced report filters
- Report column reordering
- Stationary headers

Advanced Trading: WealthStation Trading offers advanced trading capabilities that help enable financial professionals to meet their clients' trading needs.

- Basket trading
- Percentage order entry
- Quick order entry multiple trade
- Power trading
- Trailing stops

Positions Report

WealthStation Trading Offers:

Snapshot Quotes: The seamless integration of real-time market data empowers financial professionals to make informed decisions.

- Real-time quotes
- Delayed quotes
- Real-time option chains
- Delayed option chains
- Real-time watch lists
- Delayed watch lists

Please note that real-time quotes are available upon request. Additional fees may apply.

Trading: By processing trades efficiently and accurately, WealthStation Trading assures reliability to help financial professionals establish trust and confidence with their clients.

- Stock trade
- Option trade
- One-click cancel
- Modify orders
- Books and records compliance
- Mutual fund purchase
- Breakpoint compliance fields
- Commission overrides
- Beta order numbers
- Mutual fund redemption
- Mutual fund exchange

Real-Time Account Information: WealthStation Trading provides real-time account information and real-time market data. Financial professionals can support their clients with up-to-the-minute information.

- Pop-up executions
- Real-time open orders, executions, UR outs, balances, and positions
- Positions marked to market
- Asset allocation
- Bar charts
- Pie charts
- Real-time activity
- Realized and Unrealized tax lots

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WealthStation Trading

SunGard's WealthStation Trading solution is an industry leader, providing comprehensive functionality in one bundled product.

- Sector distribution of portfolio
- Projected cashflow
- Real-time basket status
- Automatic schedule D
- Short/long-term gain calculations
- Cashflow drilldown
- Previous month's cashflow

Statements/ Tax Documents: Financial professionals can receive immediate online access to all statements and tax documents.

- Electronic confirms, statements and tax documents

Account Maintenance: WealthStation Trading streamlines navigation, and by reducing clicks and maximizing data displays, financial professionals have easy and immediate access to all clients' accounts.

- Customer name and address
- Document center
- Household creation and aggregation
- Tax ID search
- Short name search
- View all accounts
- Account wizard
- Edit preferences
- Password changes
- Email, fax and voice notifications
- Group creation

Commission Reports

Action Items

Navigation and Interface: Financial professionals can navigate through a simple, powerful next-generation design. WealthStation Trading has an intuitive interface, which helps ensure a highly productive session.

- Pulldown cascading menus
- Symbol lookup
- Account type autoselector
- Download to excel
- Printable screen formats
- Pop-up calendars
- Information wizard
- Dynamic presentation layer

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