
# WealthStation Trading Platinum

## Legent Clearing offers WealthStation Trading - A premiere front-office solution offering expansive functionality in a single tool.

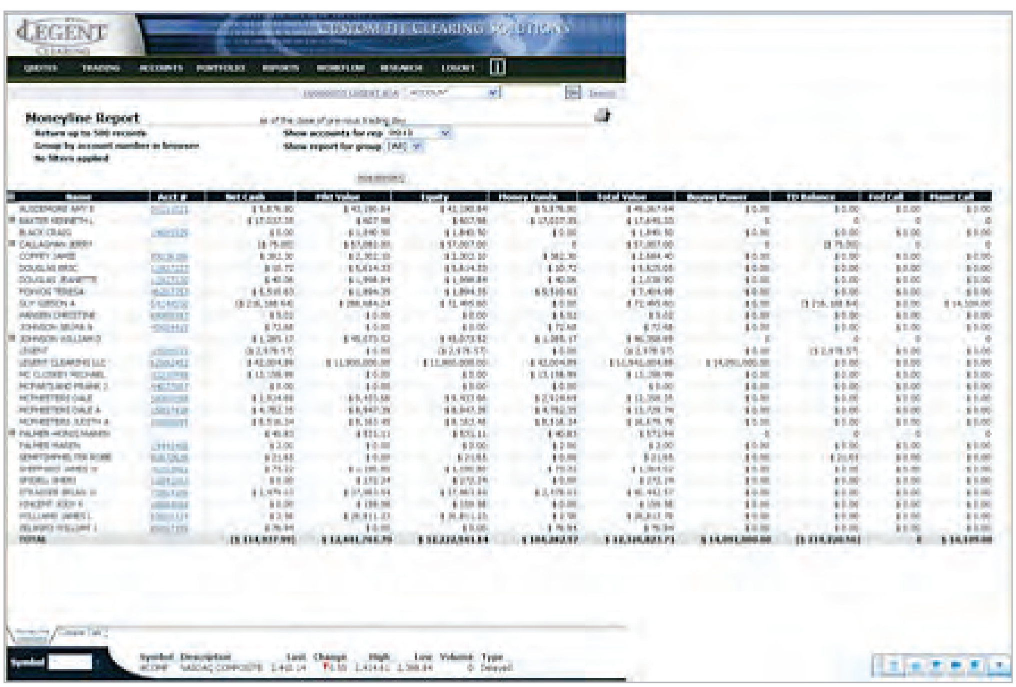
This fully customized, comprehensive front-office solution offers financial professionals an industry-leading software platform. The platinum package features portfolio rebalancing, performance reporting and block trading, all fully bundled into one robust tool. WealthStation Trading provides financial professionals the extensive front-office solution they need to further customize and personalize their services and to help drive sales.

### 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.*




Moneyline Report

### *Platinum Package Featured Functionality:*

**Reports:** Financial professionals can build customized reports easily and quickly. By creating reports, financial professionals can strategize and drive revenue.

- Commissions report
- Stock record report
- Moneyline report
- Open orders report
- Activity report
- Trade blotter
- Advanced report filters
- Report column reordering
- Stationary headers
- Group drilldown reports
- Fixed format reports
- Collapsible data elements
- % of holdings positions report
- % of MV positions report
- Filter positions by security type

**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
- Easy click sell off
- Easy click open order cancel
- Block/bunched trading
- Inventory trading
- Trailing stops

*continues—*

**Complex Options:** Financial professionals can execute advanced options trades.

- Spread
- Straddle
- Combination
- Covered write
- Ratio spread
- Collar spread
- Strip/strap
- Butterfly spread
- Box spread
- Married put
- Buy write

**Portfolio Rebalancing:** Trading and rebalancing functions are usually found on separate platforms, resulting in manual process intervention, loss of time and an increase in the risk that information errors could occur. Having integrated capabilities within one system helps financial professionals service their clients.

- Asset tree builder
- Exclusion lists
- View by asset class

**OSJ/Office Level:** WealthStation Trading helps enable critical compliance monitoring.

- OSJ reporting levels
- Drilldown by rep
- Office code search

**Advanced User Profile Management:** Financial professionals are able to monitor clients' user experience, receive reports on how clients are utilizing the Web site, and log in and view the same Web site pages that their clients are accessing.

- Shadow login
- Session report
- PDF client reports

**Performance Reporting:** Financial professionals can view investment performance and create performance reports. This signature feature is provided as part of a fully bundled front-office solution.

**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


Complex Options

**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
- 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

**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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