

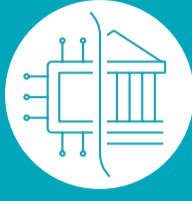
# Global Wealth Platform

Solving complex needs to drive asset growth

## Wealth managers face a range of challenges



Increasing operational complexity and client demands



Evolving business models including robo and hybrid



Increased competition and fee compression



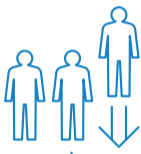
Constant and new regulatory pressures

## Our Global Wealth Platform helps managers attract new client assets and improve efficiency

Support AUM growth and complexity



Attract new advisors with up-to-date technology



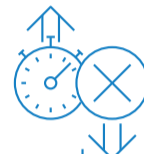
Scale with business growth



Improve operational efficiency by reducing errors



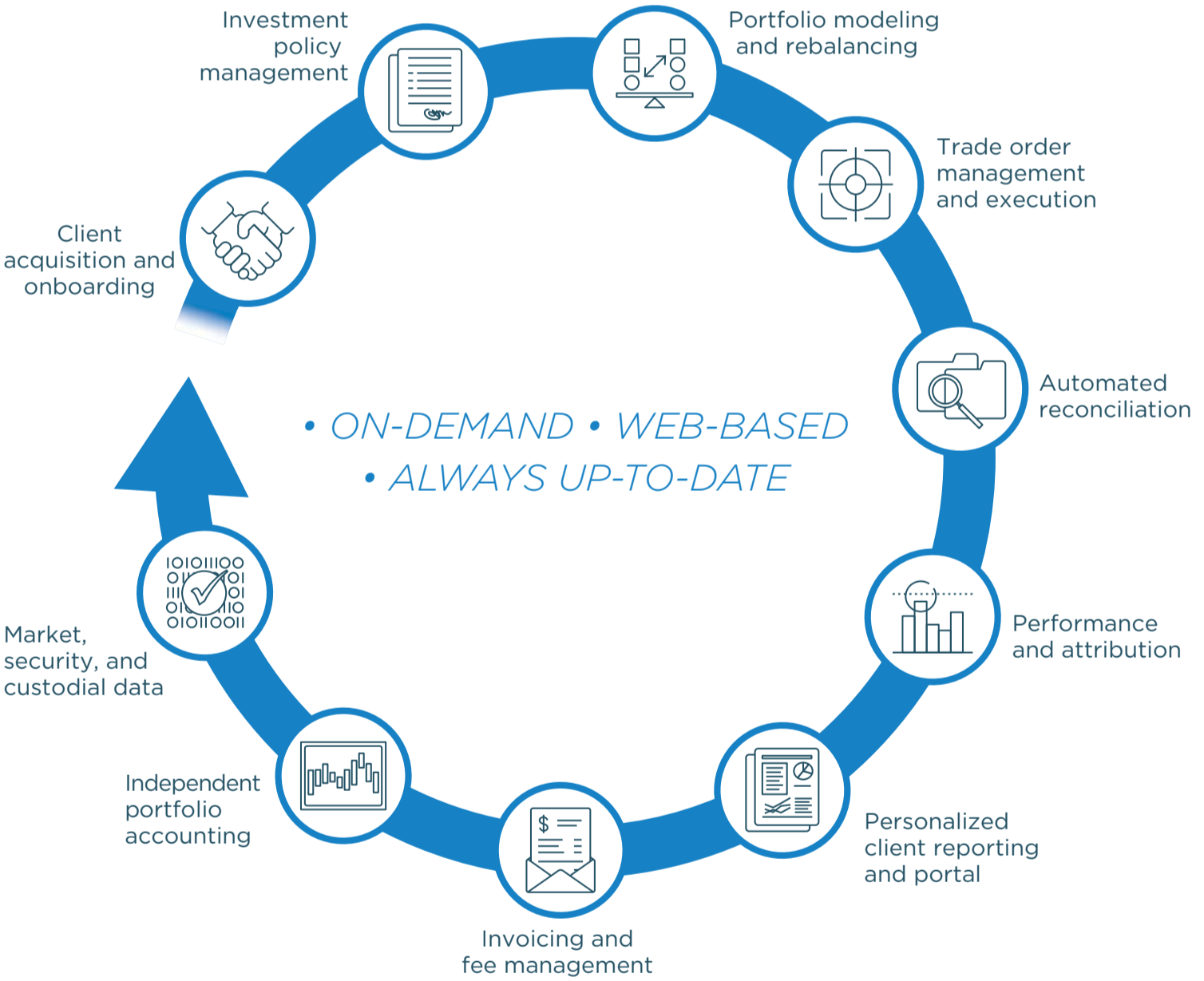
Generate personalized client communications



Support diverse account structures, including UMA, sleeves



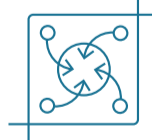
## AN INSTITUTIONAL-GRADE SOLUTION FOR THE FULL INVESTMENT LIFECYCLE



## GAIN FURTHER ADVANTAGES WITH OUTSOURCED OPERATIONAL SERVICES



Extend your team with our experts



Focus on core competencies: investing and gathering assets



Always have the latest services and technologies

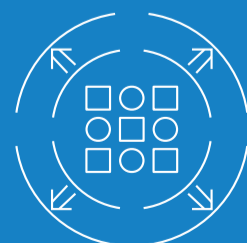
## TRUSTED BY THE WORLD'S MOST FORWARD-THINKING INVESTMENT MANAGEMENT FIRMS



**>80**  
GLOBAL CLIENTS

• Scales from \$1B to \$80B+ AUM

• Supports geographically-dispersed businesses



**>500K**  
ACCOUNT SCALABILITY

• Multi-account structures  
• 90% of clients leverage UMA and sleeves

• Unlimited strategies  
• Multi-asset class  
• Multi-currency