

Defining Financial Integration

A recent Moss Adams study concluded that RIAs who use “integrated technologies” had 36% higher revenue per professional and 30% higher profits per owner.

So how can *integration* help achieve these higher revenues and profits? Examples include:

- ❖ Saved time: Tasks that used to take hours now happen in seconds
- ❖ Reduced risk: Accurate data means less risk
- ❖ Increased profits: You now have more time to spend recruiting new clients and services
- ❖ Increased flexibility: Single sign-on – removes the need for separate usernames and passwords, and single user interface - eliminates the need to learn and remember different features & functions

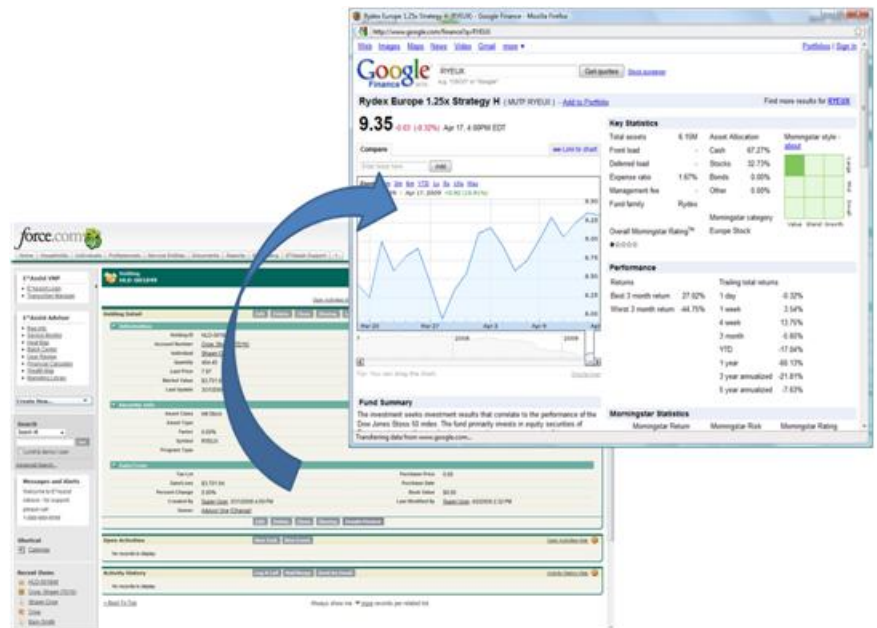
But what does “integrated technologies” mean? Although there is no formal definition, here are four examples to illustrate capabilities available today:

LEVEL 1: HYPERLINKS

Hyperlinks allow an advisor to open another web site at a specific page. In this example, the advisor clicks on a Financial Holding’s ticker, which launches a new browser page, opening Google Finance containing that ticker’s information.

This allows quick access to key data, saving the advisor the time and frustration of searching for specific information.

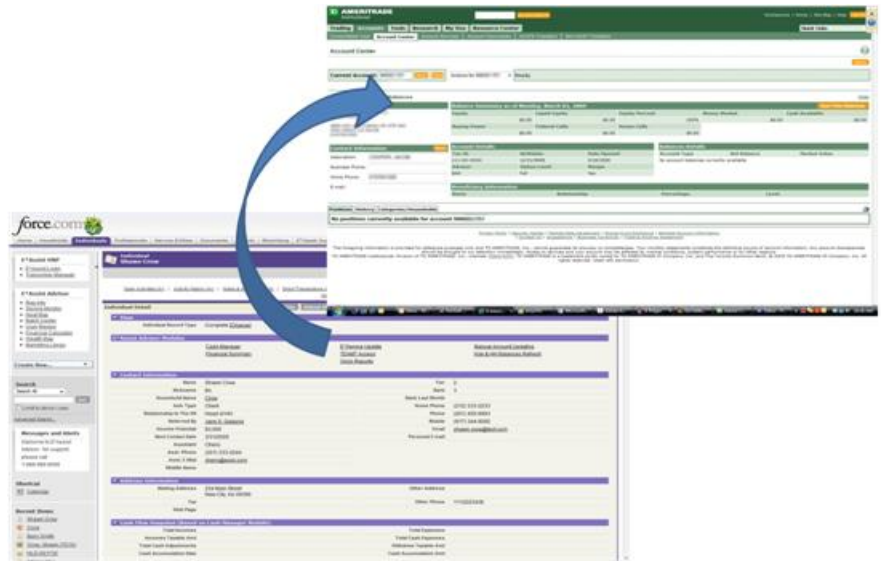
Hyperlinks are typically limited to passing small amounts of data between services, and the lack of true data blending limits the ability to search across the two services concurrently.



Mini white paper

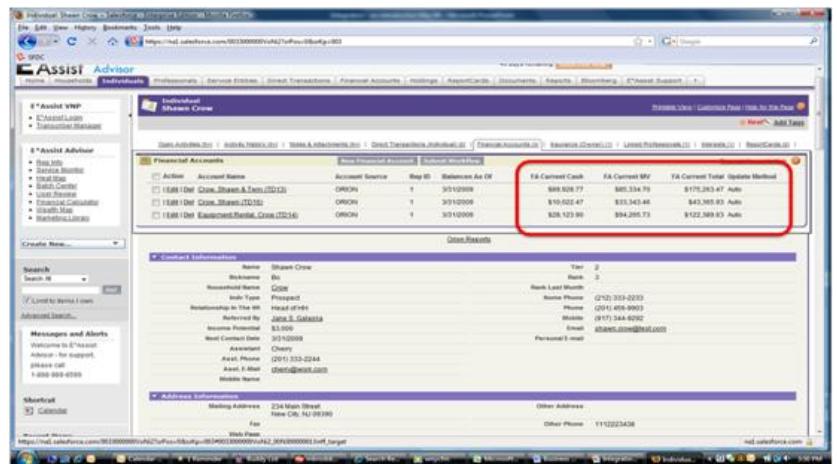
LEVEL 2: SINGLE SIGN-ON

Single sign-on allows the advisor to open another, secure, application. In this example, the user wants to open a trading platform. They click on a link next to an investor's account details. Secure log-in details are passed to the trading application as well as relevant account & investor information. The trading platform opens at the client's account, allowing immediate trading and account maintenance.



LEVEL 3: DATA PASSING

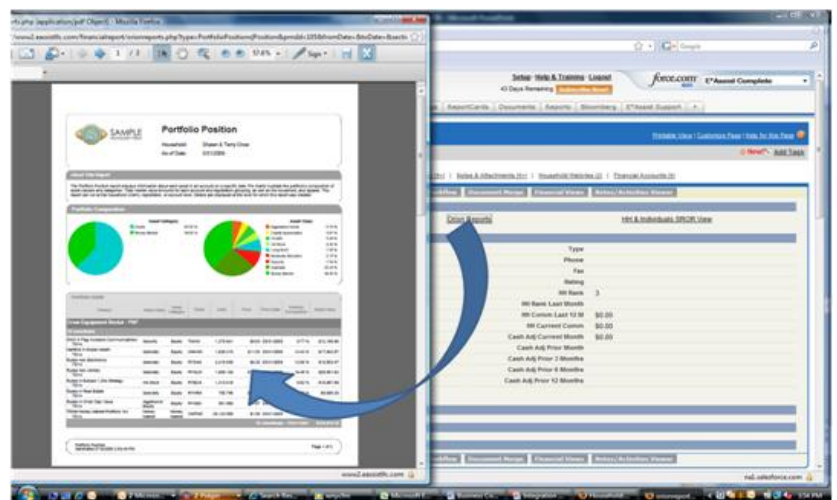
Data passing pulls and pushes data between separate applications. In this example, a Portfolio Accounting systems account balances are integrated into the advisor's CRM data. The advisor can see up to date account balances alongside more traditional CRM data such as notes, events and attached documentation.



This proves a single dashboard with all key investor data integrated into one screen for easy and error free access. Integrated screening and filtering is also supported.

LEVEL 4: IN-DEPTH WEB SERVICES

In-depth web service integration allows one application to run another without leaving the first. In this example E*Assist launches Orion Advisor and retrieves detailed financial reports. The reports appear directly inside E*Assist without changing applications.



Joel Bruckenstein recently evaluated E*Assist's integration in April's issue of Financial Planning magazine:

- ❖ E*Assist is] a really impressive integrated suite of products.
- ❖ .. the initial version is impressive
- ❖ .. navigation of E*Assist is intuitive
- ❖ The benefits of integration are unmistakable ..
- ❖ E*Assist is built on top of Salesforce.com, a leader in CRM and "cloud computing"

In conclusion

True integration has enormous benefits to advisors:

- ❖ Time and money saved
- ❖ Errors reduced
- ❖ More time means clients are better served

Advisors can help themselves:

- ❖ Demand deeper integration
- ❖ Support the industry's innovators

If your business comprises separate applications, data duplication, rekeying, error rates, wasted time, and too little time with your clients:

- ❖ It is time to upgrade
- ❖ Embrace true integration

E*Assist

E*Assist is an operational system that delivers an innovative, single-application turnkey solution to financial advisors. E*Assist is built on the Force.com platform, benefiting from salesforce.com's trusted global service infrastructure, which currently supports 1.1 million users across 51,000 organizations around the world. The open architecture platform can integrate virtually any existing technology, including CRM; client, compliance and back office management, as well as data aggregation. The firm recently announced that it has surpassed the \$2 billion mark in assets under integration on its platform. The firm serves broker/dealers, Registered Investment Advisors, money managers and custodians.

Please click here to review the list of our integration partners:

http://www.eassistllc.com/3rd_Parties.html

Please click here to see a short video featuring examples of portfolio accounting and financial planning tool integration: http://www.eassistllc.com/Captivate/demo_advisor/demo_advisor.htm