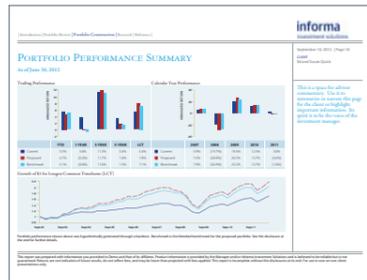


Products and Services

Wealth Management & Investment Planning

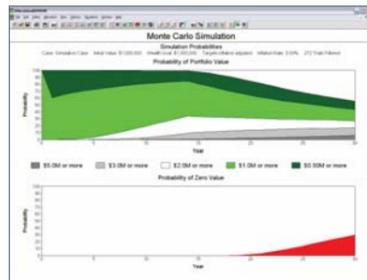
WealthIQ

WealthIQ is an investment planning and proposal generation system that produces compelling, branded presentations. It provides the perfect balance between customization and automation, giving advisors flexibility, while ensuring compliance with critical business standards. WealthIQ offers an efficient workflow solution by delivering intuitive investment recommendations based on business requirements and compliance rules.



Zephyr AllocationADVISOR

Zephyr AllocationADVISOR is a comprehensive asset allocation, optimization and portfolio simulation solution. With Zephyr AllocationADVISOR, you have everything you need to effectively determine the best investment allocations for your client portfolios and produce professional reports that communicate your analysis clearly and concisely.



ComplianceIQ

ComplianceIQ makes investment policy statement and regulatory compliance easier and more efficient by providing a scalable monitoring solution with minimal resource demands. You can manage workflow and create an audit trail with active portfolio monitoring, on-the-fly scenario analysis and activity logs that keep a record of any account changes. ComplianceIQ enables your firm to demonstrate a superior approach to prudent investment practices.



Content Distribution & Fact Sheet Production

Global Manager Neighborhood

Global Manager Neighborhood is a data collection portal for the PSN Money Manager Database, which distributes key money manager content to investors via PSN, Zephyr, other Informa Investment Solutions products and third party organizations' technology platforms. Participation in the PSN Database is complimentary and the mandatory starting point for the world's largest institutional brokerage platforms and consultant manager search processes. Over 2,000 money managers worldwide report into the Global Manager Neighborhood, each providing data to Informa Investment Solutions' broad audience of investment professionals.



ProfileProducer

ProfileProducer is a web-based platform that generates clear and concise investment fact sheets designed to your specifications. Packaged with a streamlined data collection and workflow management process, ProfileProducer allows for the timely production and distribution of accurate and compelling sales materials. Consolidating multiple data sources, providing up-to-date information and

ProfileProducer, continued

producing impressive fact sheets will become a smoother process with the power of ProfileProducer.



PSN Data Select

PSN Data Select offers access to premier, detailed information on over 2,000 organizations and 20,000 investment products – including their people, accounts, fee structure, management styles, philosophy, historical returns and statistics. With PSN Data Select, you review the types of data offered and purchase only what you need. Your data feed is crafted based on your required field(s), delivery frequency, and format. This flexibility gives you access to data feeds that offer the same high quality industry information found in PSN, without purchasing the software application.

Reporting Service Bureau

Reporting Service Bureau is a report generation service created for Zephyr StyleADVISOR, Zephyr OnDEMAND Sales, and PSN Enterprise clients. It offers both predefined and customizable templates and workbooks to enhance your report fulfillment process. Our expert staff works with you from creation to production. Once approved, your templates and workbooks are loaded into your library. You can then generate your own reports, or let Reporting Service Bureau automate report production according to your schedule; delivering reports as PDFs or posting them on Zephyr OnDEMAND Sales or PSN Enterprise.



Our History & Growth

Informa Investment Solutions has continued to evolve and expand over the years to become a leading provider of financial software and services. Every day, more investment professionals and institutions turn to Informa Investment Solutions to improve the accuracy, depth, and presentation of the information their clients require.

Partnering with Industry Leaders

We are the leading provider of software and services to over 2,000 financial institutions; including brokerage firms, money management firms, bank trusts, investment consultants, independent advisors, and pension plan sponsors. With a multitude of solutions that can be customized to meet your specific business requirements, Informa Investment Solutions offers the right combination of technology and services to meet your needs. We partner with premier data providers to ensure you have access to a broad range of datasets. Through our external partners, we provide various pass-through content to create a multifaceted solution for our clients.

Customizable Solutions

Informa Investment Solutions services many institutional and retail clients, providing products and services for investment advisory firms of all sizes and types. We serve small and midsize organizations, as well as major wirehouses, multinational banks, large consultants, and top money management firms. Many of these firms have been loyal clients, trusting our data, systems and development capabilities over the past 40 years.

Since every client is different, Informa Investment Solutions creates custom solutions to suit your business. Our staff will work closely with you to understand your objectives and then tailor each solution to meet your needs. Whether accessed via the web, installed via ASP, or installed locally, we are committed to providing the information you require, in the format you need.

About Financial Intelligence

Our customers look to us to provide leading-edge financial information and critical decision-making products. Gain a competitive advantage by using our research to make better business decisions and form more effective strategies.

Our key focus areas are:

- Investment Services
- Wealth Management
- Money Market Funds
- Fund Flows
- Insurance
- Retail Financial Services
- Staff & Customer Engagement
- Proprietary Investment Indicators

Our brands are:

- EPFR Global
- iMoneyNet
- Informa Global Markets
- Informa Investment Solutions
- Informa Research Services
- eBenchmarkers

