

Adhesion Wealth Advisor Solutions Launches Their Next Generation Investing-Monitoring-Reporting Platform – “Adhesion 3.0”

Features include an investment “Command and Control Console,” Unified Managed Households and an intuitive workflow engine—all helping to increase operational excellence and facilitate AUM growth

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Adhesion Wealth Advisor Solutions Inc. (“Adhesion”), a leading solutions partner to wealth advisors nationwide, is pleased to announce significant enhancement to its market leading ‘Investing-Monitoring-Reporting’ platform, “Adhesion 3.0.”

Adhesion 3.0’s multi-phase rollout provides significant enhancements to the firm’s already robust platform, including innovative capabilities in workflow management, Unified Managed Households (“UMH”), and in-depth business analytics. As a whole, Adhesion 3.0 delivers an unprecedented level of customizable investment and client management capabilities that help the advisor to not only better manage their clients’ investment portfolios on a day-to-day basis, but also to provide greater insight into their overall business.

“Wealth advisors have long valued the nature of the Adhesion Partnership, where they maintain full control over the client relationship and investment strategy, while leveraging Adhesion to handle all aspects of implementation,” comments Michael Stier, President & CEO of Adhesion. “The launch of Adhesion 3.0 is particularly exciting as we significantly enhance the value of the partnership through elevating the breadth and depth of services that advisors can extend to their clients, as well as providing opportunities for advisors to grow their assets under management.”

Central to Adhesion 3.0 is the introduction of a complete “Command and Control” console that provides advisors with sophisticated data mining, filtering and alert capabilities to monitor and control the investment process for their clients.

Woven throughout Adhesion 3.0 is a powerful new Adhesion workflow engine that provides value where it is needed the most—in the investment management platform. This workflow engine helps advisors create standardization and consistency in handling of their monitoring, administrative, supervisory and client communication tasks. The engine provides a library of

Major enhancements included in Adhesion 3.0 include:

Investing Enhancements

- **Active Fixed Income Management** – Expanded fixed income investment options within Adhesion’s leading unified managed account (UMA). Advisors serving high net worth and institutional clients have sought the option for active management of individual fixed income holdings, instead of funds, as part of the total asset allocation solution provided. With Adhesion 3.0, advisors may now elect to have leading 3rd party fixed income specialists actively manage the fixed income sleeve directly within the Adhesion UMA.
- **‘Away assets’ into Unified Managed Household (“UMH”)** – enables advisory services to be extended to ‘held-away’, non-discretionary assets by incorporating them into asset allocation and rebalancing decisions for client portfolios.

Monitoring Enhancements

- **Investment “Command & Control”** – provides advisors with sophisticated data mining, filtering and alert capabilities to effectively monitor and supervise the entire investment process for their clients, including 3rd party asset managers. With Adhesion 3.0, advisors gain the unique ability to ‘manage by exception’ — using data analytics to proactively identify investment or client related conditions, events or circumstances that require advisory attention, and then have the tools react accordingly.

pre-built workflows for advisors to leverage as well as facilitating the construction of firm-specific workflows.

Another exciting feature in Adhesion 3.0 helps advisors grow AUM from their clients' existing "held away" assets. Building upon a partnership with ByAllAccounts, advisors are able incorporate these away assets into Unified Managed Households ("UMH"), thus incorporating them into the asset allocation and portfolio rebalancing process. This innovative UMH capability provides advisors the opportunity to expand value added services to clients, as well as corresponding advisory fees.

Adhesion 3.0 also brings with it the addition of active fixed income investment strategies. Advisors may now elect to have leading 3rd party fixed income specialists who can manage their fixed income sleeve directly within the Adhesion UMA.

- **Away Account Analyzer** – Helps advisors extend analytic and advice services to the portion of their clients' portfolios 'held away'. Enables advisors to illustrate risk/ return contributions of non-discretionary assets to the total portfolio and contrast to those managed on a discretionary basis.

Reporting Enhancements

- **Investment Goals**– Allows advisors employing proprietary strategies to build custom composites and track performance outliers against an aggregate return.