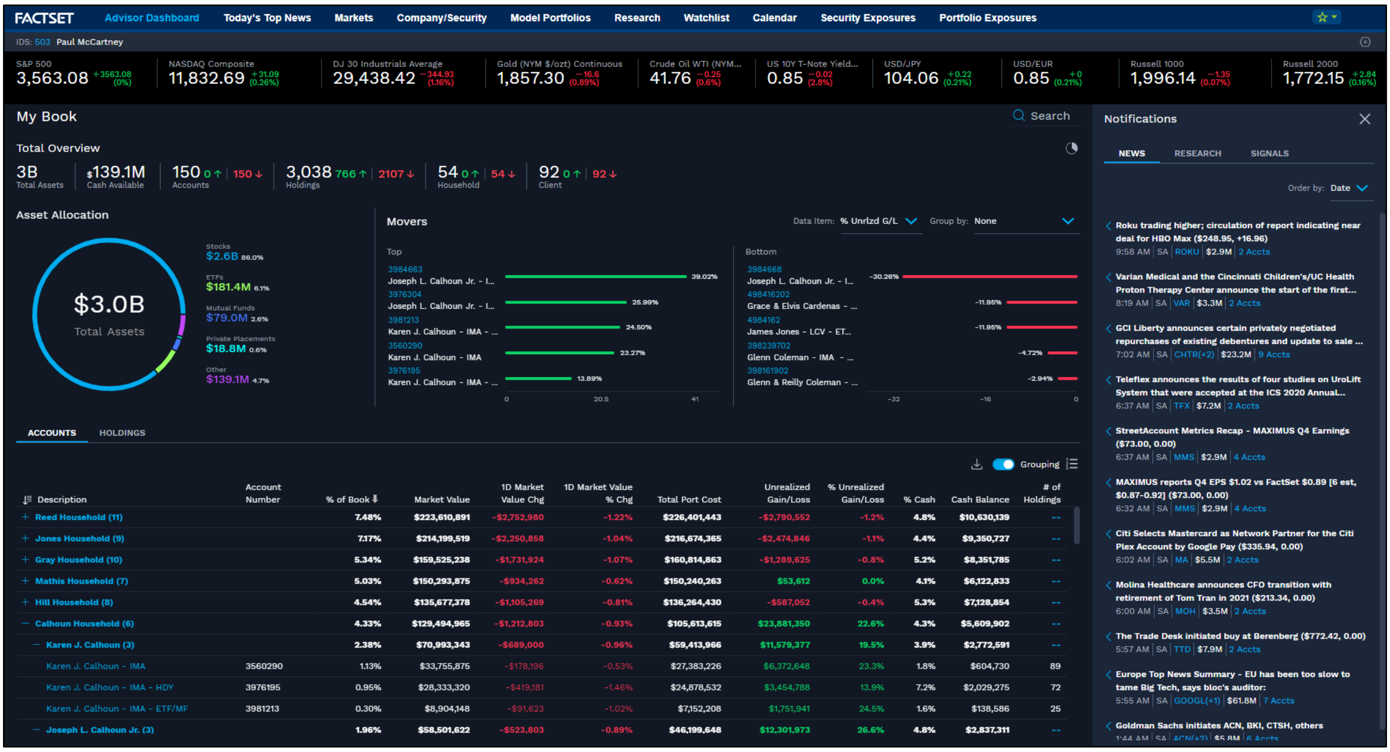
FACTSET 〉SEE THE ADVANTAGE

Advisor Dashboard: An efficiency and engagement tool for advisors managing relationships and portfolios at scale

Improve internal and external communication as well as client engagement with an intuitive, responsive, and integrated wealth management platform.



EASILY TRACK ALL OF YOUR CLIENTS' PORTFOLIOS IN ONE PLACE

Access all your accounts in one consolidated view with a dynamic interface that is personalized for each advisor. Quickly evaluate top positions and use traditional as well as FactSet's proprietary signals to discern trends and evaluate market-moving events. View summary statistics for your entire book of business or a subset, including total market value, aggregate holdings, and asset allocation. Evaluate your portfolios by household, individual, strategy, and more.

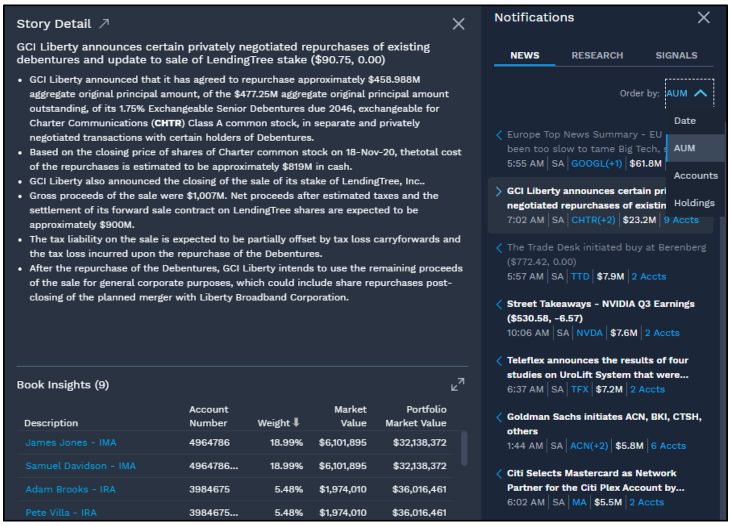
Take advantage of Advisor Dashboard's data aggregation capabilities to surface insights that will allow you to better serve your clients with the right information, at the right time. Benefit from knowing in real time which market events are impacting specific client accounts.

CREATE DYNAMIC PORTFOLIO COMPOSITES

Easily group your portfolios on the fly using key attributes such as household, tax status, model, investment objective, and level of investment discretion to report important insights and statistics back to your clients. See your positions aggregated in real time without needing to create predefined composites. Experience the superior performance afforded by the storage of key portfolio and security data in a secure instance of FactSet's SQL server framework.

VIEW NEWS STORIES FILTERED BY RELEVANCE AND RECEIVE ACCOUNT ALERTS

Track market activity in real time with seamless integration of market-moving news and research into one consolidated view with the ability to sort by date, assets under management, and the number of accounts impacted. Stay one step ahead with security-level news and insights contextualized by your book exposures. Receive alerts on companies with significant AUM across all your accounts so you can quickly communicate key developments to your clients. Access previews of news stories related to your clients' holdings with direct links to the full news article, impacted client accounts, and featured securities.



ANALYZE YOUR CLIENTS' INVESTMENTS ANYTIME, ANYWHERE

Access Advisor Dashboard and its content via several channels, customizing the integration to meet your advisors' needs. In addition to the traditional FactSet workstation, view Advisor Dashboard using FactSet Web as well as your tablet or smartphone.

Leverage FactSet's suite of APIs to enrich your existing CRM or internal applications with Advisor Dashboard content. Integrate FactSet's unique content and dynamic reports into your internal wealth portal alongside your portfolio management and trading applications for an optimal user experience. Frame the individual web components into your existing intranet where they communicate seamlessly with your native intranet displays.