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Advisor Software Extends Capabilities of Salesforce Financial Services Cloud with New Suite of Customizable Apps

Advisor Software Participates as Salesforce Financial Services Cloud Launch Partner to Transform the Client-Advisor Experience with Enhanced Portfolio Management & Client Engagement Solutions

WALNUT CREEK, CALIF.—March 8, 2016—Advisor Software, Inc. is extending the capabilities of Salesforce Financial Services Cloud with a new suite of customizable apps that enhance the ability of financial advisors to serve and engage their clients. These initial new apps encompass new-client lead generation and onboarding, digital wealth management and "robo advice," portfolio management, and rebalancing. Salesforce Financial Services Cloud is generally available for purchase today, empowering advisors to build deeper, one-to-one client relationships as well as become more productive and engage more holistically with clients.

Advisors can learn more about the Salesforce Financial Services Cloud at http://www.salesforce.com/financialservicescloud.

"We are excited about the opportunity to work collaboratively with Salesforce to provide innovative and customized solutions for wealth managers at a time when the wealth management industry faces market fragmentation, pricing pressures and other demographic and disruptive changes," said **Andrew Rudd, Chairman and CEO, Advisor Software**. "Our integrated financial planning and investment advice apps work individually and together to automate typical wealth management processes, so financial advisors have more time to spend on deepening client relationships and growing their practices."

The integrated suite of Advisor Software apps that will integrate with the Salesforce Financial Services Cloud is designed to facilitate advisor-client interactions, increase client engagement, streamline practice operations and increase advisor efficiency:

- A lead generation workflow will allow investment advisors to launch a fully self-directed new-client acquisition experience directly from the advisor's existing website. The app allows advisors to create custom client profiling and risk questionnaires with an optional goal exploration module, as well as an eSign capability for account paperwork.

- A related client portal app offers a fully mobile-responsive, white-label "robo-advisor" solution. It enables advisors to efficiently serve accounts of any size, and offers a dashboard with account aggregation, net worth reporting, asset allocation, holdings and performance information. Additional views offer goal exploration, client self-service features and account information. The flexible design accommodates a wide range of investment products, enabling the deployment of digital advice internationally. Both the lead generation and client portal apps will be offered as a single, integrated managed package.

- A portfolio management app incorporates model management with an institutional-grade portfolio rebalancer. It enables advisory firms to create and host an unlimited number of model portfolios, permitting portfolio individualization at the household level. The app's rules-based rebalancing engine enables account monitoring and rebalancing at enterprise scale.

In addition to the above apps, Advisor Software plans to introduce further capabilities spanning financial planning, investment planning and portfolio diagnostics. These new apps will extend the capabilities of the Salesforce Financial Services Cloud, allowing advisors to collaboratively develop comprehensive goal-based financial plans with their clients, tie those financial plans to an individualized investment plan, perform robust analysis of existing and held-away portfolios, and develop portfolio comparisons as part of an investment proposal generation process—with all of these workflows seamlessly embedded within the Salesforce CRM ecosystem.

"The future is here, and it's advice, not administrative tasks," said **Simon Mulcahy, Senior Vice President and General Manager of Financial Services, Salesforce**. "Advisor Software is supporting Salesforce in its mission to deliver a new era through proactive, personalized and goal-based collaborative advice."

About Advisor Software, Inc.

Advisor Software, Inc. (ASI) is a leading provider of wealth management cloud platforms for financial advisors and institutions. The company has pioneered the first Wealth Management Cloud platform that offers streamlined access to a comprehensive range of financial services and resources. ASI's products address advisors' functional needs, including Planning, Proposal Generation, Portfolio Construction, Rebalancing, and Investment Analytics. The company's solutions serve a wide range of financial institutions and professionals, enabling asset management firms, broker-dealers, banks, insurance companies, online brokerages, custodians and providers of investment services and products to deliver more insightful, actionable investment advice and build stronger, more profitable client relationships.

For more information, please visit www.advisorsoftware.com and follow @AdvisorSoftware (https://twitter.com/advisorsoftware).

About Salesforce Financial Services Cloud

Salesforce Financial Services Cloud is transforming the client-advisor relationship by empowering advisors to build deeper, 1-to-1 relationships with clients; enabling advisors to spend less time on administrative tasks and more time focusing on investors; and allowing advisors to engage more comprehensively with clients and their households.

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