

AdvisorSites Templates

An Affordable Web Presence For An Independent Financial Advisor

An Entry-Level Site That Can Grow With Your Practice

A Financial Portal That Manages Your Clients' Internet Experience

Our Exclusive Package Of Personal Finance Articles

A Web Site That Strengthens Your Message To Clients

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- A “back-office” to easily change any page
 - A home for your online brochure
 - Publish client newsletters
 - Add links to other sites
 - Dozens template designs to pick from
 - Low-cost portfolio reporting packages
 - Articles by our own team of financial journalists
 - Add pages, links, pictures to your site easily
 - Stock quotes, indexes, charts, most active
 - Showcase your firm's brand
 - Clients can check their accounts



Quick and Cost Effective

AdvisorSites can put you online with an attractive site quickly and inexpensively. You choose from dozens of pre-designed motifs. The navigation bar, background colors, buttons and other key elements of your site are pre-designed and can be changed by you anytime using the AdvisorSites “back office.” You can add pages to your site, change the links on your site’s navigation bar, upload newsletters and much more. And it’s easy.



You can build your site in minutes. Just log onto your “BackOffice,” where you pick the look for your site. Then, upload your brochure text and biographies. You can also upload pictures of your staff and add links to your site, as well as easily making changes to the text on any page of your site anytime. If you ever have questions, you can call our tech support team. You can customize your template site with

your logo and create a handsome graphic to showcase your firm’s name in your site’s banner. And you can add AdvisorSites articles to your site to provide intelligent financial ideas to clients, add stock data, portfolio reporting, slide shows or select from many other enhancements.



Up To Four Pages Of Original Content Targeted To Advisor Clients

Financial Briefs

Personal finance stories

- Easy-to-read 300-word financial articles
- A newsletter that supports your message to clients
- Four new NASDR-approved articles each month
- \$1,000 year to non-subscribers to AdvisorSites

Articles Of Interest

We find personal finance links for you each month

- AdvisorSites finds the best articles on the web each month
- Just point and click to choose the articles you want using your BackOffice
- Fully-automated for easy updating
- \$1,000 a year to non-subscribers to AdvisorSites

Featured News

Six in-depth personal finance news articles

- 700- to 800-word articles about cutting edge planning strategies and investment ideas for high net-worth individuals
- An online newsletter of NASDR-approved articles
- Original content written by a veteran financial journalist
- In-depth coverage for sophisticated individuals
- You choose articles from a list we provide
- Updated quarterly to keep your site fresh
- \$1,000 a year to non-subscribers to AdvisorSites

Data Bank

A graphical explanation of recent market performance

- Six charts using quarterly data from Frank Russell Company
- A colorful market update
- A concise analysis of major events in the markets
- A long-term perspective on previous quarter's performance



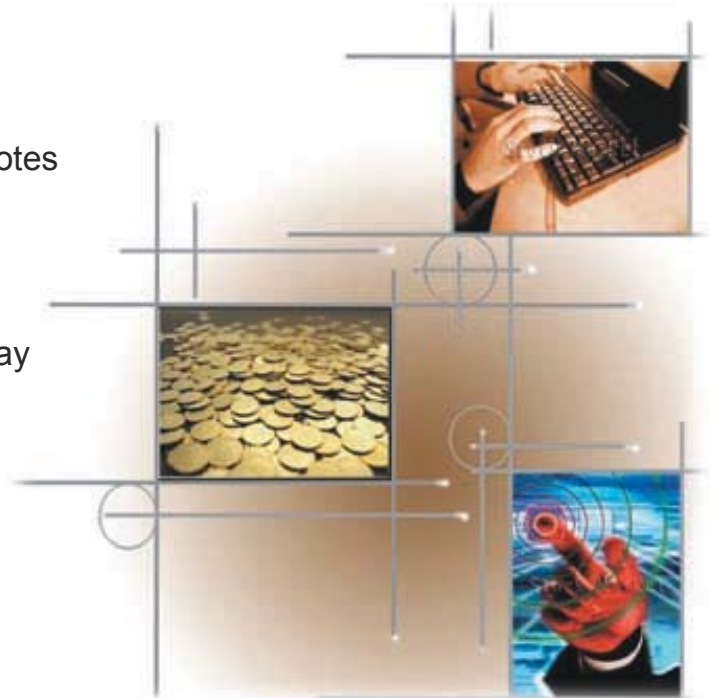
Keep Your Site Fresh With Our
Exclusive Package Of News
And Articles About Personal
Finance Strategies



Personal Data Portal

Why let your clients go to AOL or Yahoo! to track personal finances?
You can be your clients' personal financial data portal!

- Real-time major market indexes
- 20-minute delayed stock and mutual fund quotes
- Charting of stocks and mutual funds
- Biggest winners and losers on 20-minute delay
- Portfolio tracking*
- Personalized news*



AdvisorSites provides a personalized portal to the, stocks and mutual funds that your clients care about. Instead of going to Yahoo! or AOL, clients will make your site their Financial Portal!

The AdvisorSites Portfolio Tracker enables each of their clients to track up to 100 stocks and mutual funds. Securities can be sorted by price, fundamentals, or valuation.

In addition, each of your clients can track news on up to 25 topics. The AdvisorSites News Manager

allows each client to track news related to a specific industry, company, or keywords (e.g., "positive earnings"). Once you set up your topics, it automatically creates a personal news page with headlines and access to full text stories. To access personal portfolios and news, each client creates their own user identity and password. All data are stored using the highest encryption and security standards available on the Web.

* See our Content and Hosting Packages.

PRICES



Basic Setup \$250

AdvisorSites Basic Template offers an advisory firm a low-cost attractive web presence. This is a good "starter" site. The Basic Template includes a pre-designed banner graphic with your firm name that matches the template you choose.

Deluxe Setup \$500

With a Deluxe template, our graphics department customizes a banner graphic with your firm name to match your corporate identity and meet your specifications. Plus, we further customize your site by placing your logo in the top left corner of your site or in your banner. These graphics will appear on every page on your site.

Ten Pages Set Up For You

Home Page With Updateable Welcome Message/Mission Statement

Who We Are Bios And Photos Of Your Firm's Personnel

Our Services For Your Online Brochure That You Can Update Anytime

Client Update Page For Bulletins, Newsletters You Write To Clients

Web Resources Allows You To Create Links To Other Sites

Contact Us For Visitors To Ask A Question, Directions To Your Office

Account Lookup Of Client Statements Linked To BD Or Custodian

Disclosure With Regulatory And Consumer Information

Problem Solvers Financial Calculators For Your Clients

Client Forms Upload Adobe Acrobat, MS Word or Excel documents

Content And Hosting Packages

Silver \$600 Per Year

- A new 400-word financial planning article on your site every month
- Stock and mutual fund quotes
- Real time charts of major market indexes
- Top gainers and losers in stocks
- Stock charts
- AdvisorSites back-office for adding text, pictures, links and new pages to your site
- Three POP email accounts

Gold \$1200 Per Year

- Eight 400-word financial planning articles
- Market Data Bank of six colorful charts quarterly featuring Frank Russell index data
- Stock and mutual fund quotes
- Real time charts of major market indexes
- Top gainers and losers in stocks
- Stock charts
- AdvisorSites back-office for adding text, pictures, links and new pages to your site
- Three POP email accounts

Platinum \$2000 Per Year

- Six in-depth financial news features
- Articles of Interest linking to pre-selected articles on the Web
- Twelve 400-word financial planning articles
- Market Data Bank of six colorful charts quarterly featuring Frank Russell index data
- Personal portfolio tracker via password-protection
- Personalized news on securities via password protection
- Stock and mutual fund quotes
- Stock market headlines and news updated throughout the day
- Real time charts of major market indexes
- Top gainers and losers in stocks
- Corporate digest of stocks
- Stock charts
- AdvisorSites back-office for adding text, pictures, links and new pages to your site
- Three POP email accounts

A La Carte

A menu of enhancements you may want to consider adding to your AdvisorSites Template site.

Portfolio Reporting. Centerpiece and Advent portfolio reporting online through a partnership with Lync Consulting, LLC. \$495 setup/\$75 monthly.

Ibbotson Associates Slide Shows. Use Advisor Sites Web Show™ to pick from Ibbotson's 88-slide Sales Builder presentation and customize presentations. \$900 annually.

Online Planning. Via a partnership with Financeware.com, share with your clients sophisticated financial planning tools created for advisors. \$100 setup to AdvisorSites plus Financeware fees. (AdvisorSites' subscribers pay \$300 to Financeware.com — a \$600 saving.)

myStockOptions.com. Show visitors to your site that you have expertise in advising on stock options. AdvisorSites exclusive relationship with myStockOptions.com lets you frame their site, removing their branding and replacing it with your own so that you integrate this site's excellent content and tools into your site. (\$200 set-up fee to AdvisorSites and a \$500 annual fee to myStockOptions.com.)

