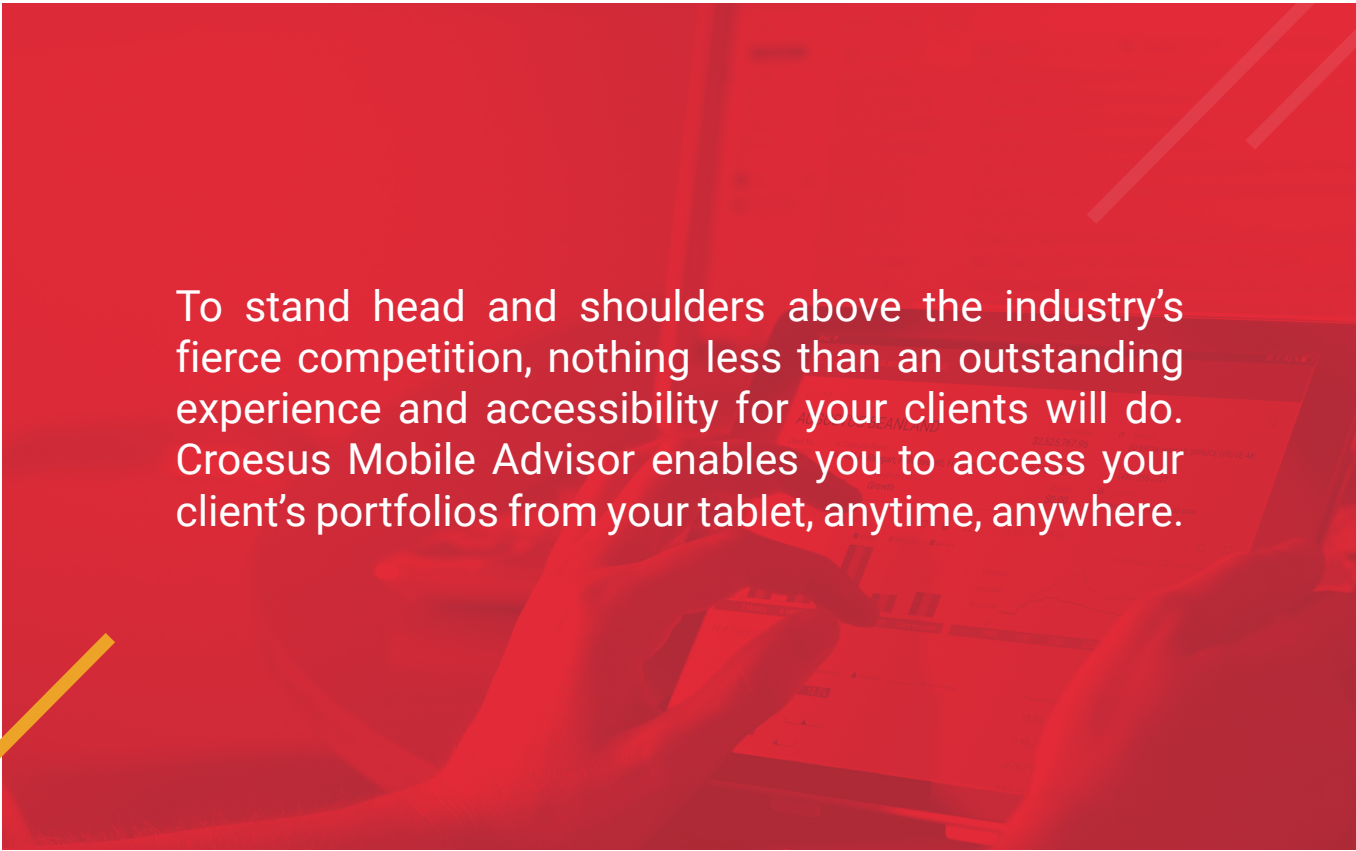


---

# CROESUS MOBILE ADVISOR

Designed for advisors





To stand head and shoulders above the industry's fierce competition, nothing less than an outstanding experience and accessibility for your clients will do. Croesus Mobile Advisor enables you to access your client's portfolios from your tablet, anytime, anywhere.

## Key features

Simple interface adapted to your reality

Filtered view of accounts, clients, and relationships

Dynamic, customized presentation mode to facilitate client meetings

Intuitive table illustrating asset allocation (objective-based performance)

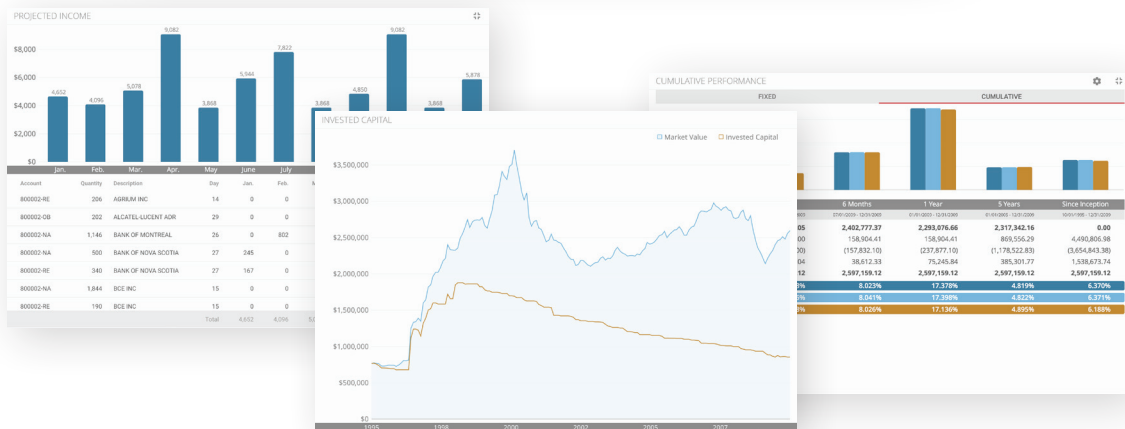
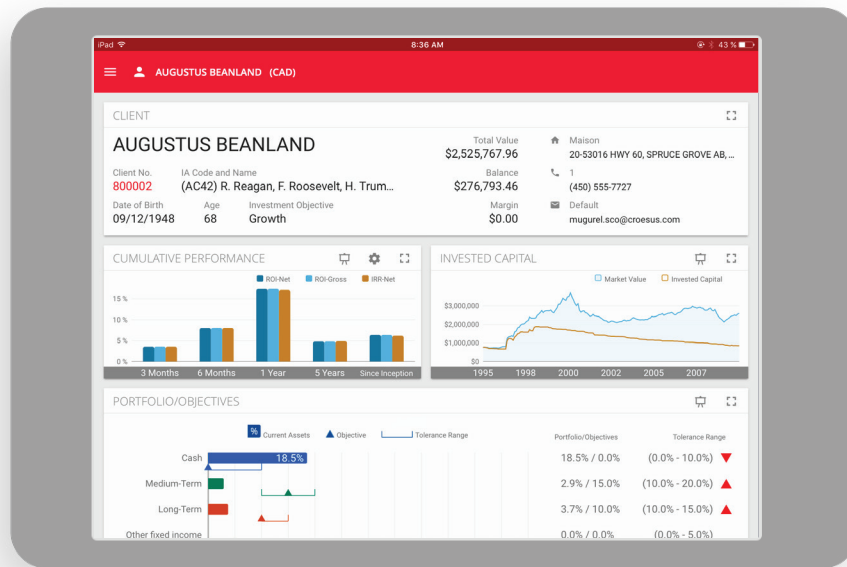
Liaison between information shared with the client and the investor portal

Quick and easy access to data

Creation of client notes transferred concurrently to Croesus Advisor

Access to client lists, contact information, and account numbers

Access your CRM data on the go



## Access key investment data

- ✓ Portfolios
- ✓ Account performance
- ✓ Projected income
- ✓ Invested capital
- ✓ Cash balances
- ✓ Total values
- ✓ Positions held

## Securely access data

**Croesus Mobile Advisor** guarantees continuous service and maximum information security. Since you can readily access the most important data from your tablet, answering your clients' inquiries has never been so fast and easy. To ensure maximum information security, the data displayed will come from Croesus Advisor and will never be stored on the device.

*Croesus Mobile Advisor is available on iOS and Android tablets.*

## About Croesus

Since 1987, Croesus has been providing sophisticated wealth management solutions to financial institutions throughout North America. Currently, 14,000 investment professionals use Croesus solutions to manage over \$1 trillion in assets. With its 180 dedicated employees, Croesus has built a reputation on the ability to efficiently transform data into information, develop portfolio management solutions to drive efficiency and deliver business intelligence for fact-based decision-making.



[www.croesus.com](http://www.croesus.com)