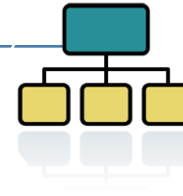




Delivering transformational systems that innovates how financial institutions manage their client profile & risks, measure asset exposure and firm liability across all client accounts while automating relationship management through CRM



AppCrown Wealth Plus supports financial advisors relationship building process



AppCrown Wealth Plus offering consolidates an advisors book of business and the firm's business processes to support the entire client relationship cycle



Client Profile Monitoring features integrates all tasks, notes, and history of the client to deliver dynamic search engine capability into your households



Proactive alert management and predictive management system gives financial advisors and operations the technology needed to cover all households and relationship tasks



Customer experience and profile management. Scale and integrate business middle office and back office with front office relationship needs by the reps across your firm

Our Clients



- OEM/Reseller of AppCrown Wealth Management as the core advisor workstation for independent RIAs seeking an custodian sponsored CRM system



- Transformative CRM system to integrate back office and middle office processing so the business unit can accelerate client acquisition



- Enterprise solution for wealth management to aggregate all clearing assets and balance sheets into a central CRM
- Integrated CRM allowing retail bank to integrate leads and referrals into wealth management



- Across 150+ reps, AppCrown delivered an enterprise CRM strategy to manage and measure rep/advisor performance across the company's sales goals. Over 2 years, the firm has generated 15% more revenue on AppCrown's Wealth Plus solution



- Provide Enterprise CRM solution for Key Investment Services (KIS) brokerage unit
- Integrate Pershing/DTCC/DST back-office data into Salesforce CRM solution



- Advanced eMoneyAdvisor integration to track quarterly net worth gain & loss

Our family of products for Wealth Management, Banking & Investment Services

FIAAS

- Financial integration as a service for financial institutions seeking a streamlined aggregation system that is cost effective and scalable
- Aggregation of back office financial systems (assets, holdings, etc) into a central CRM
- Middle office systems integrated into an enterprise CRM

Wealth Plus

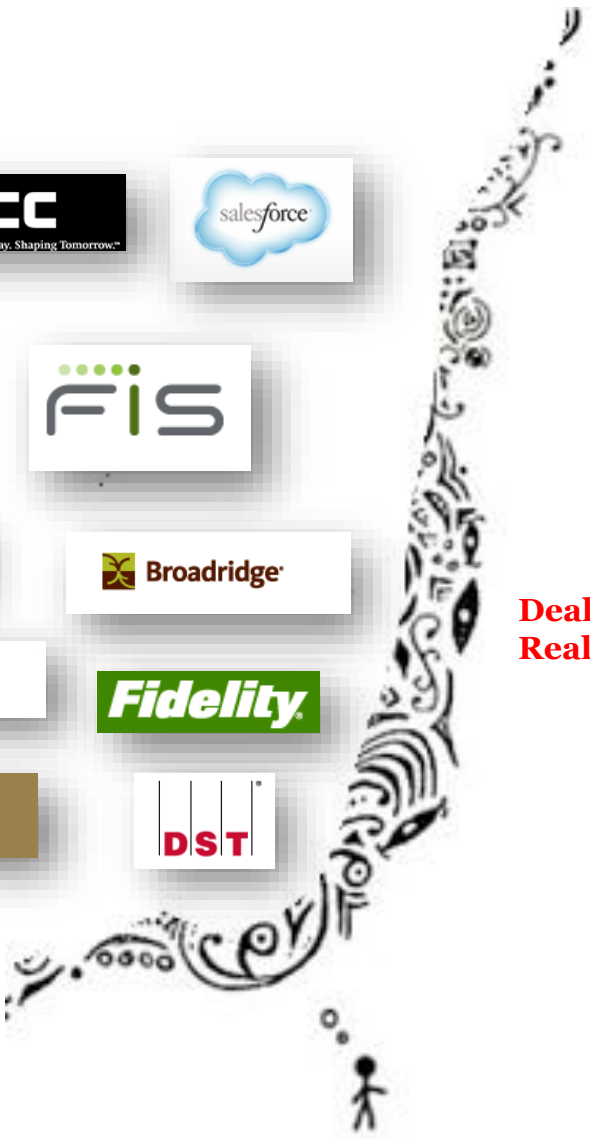
- Advisory platform for wealth management and brokerage units needing to manage their clients profile and scale relationship management across a central CRM
- Capability to Integrate all 3rd party vendors and software that are client facing into a fully integrated client profiling and household management tool
- Advisory platform to automate relationship management and advisory based businesses

APPGOLD

- Advisory Fee/ Brokerage Commission and Trade Surveillance system built around CRM
- Integrated reporting for real time transaction reporting for compliance and rep/advisor surveillance
- Natively built and scaled into Salesforce.com

RoboMonitor

- Advanced Robotic Monitoring solution for the retirement accounts helps your firm managing the DOL Fiduciary Regulations
 - Client Profiles (new & existing)
 - Risk monitoring & reporting (incl. fees & expenses)
 - Dashboard for overall management
- RoboMonitor is the first All Accounts monitoring solution in the industry. It utilizes the Morningstar ratings as the reference standard to measure risk for your clients and their retirement accounts



Deal With This Reality

You have multiple vendors, multiple systems, and no single platform to measure and centrally oversee all processes

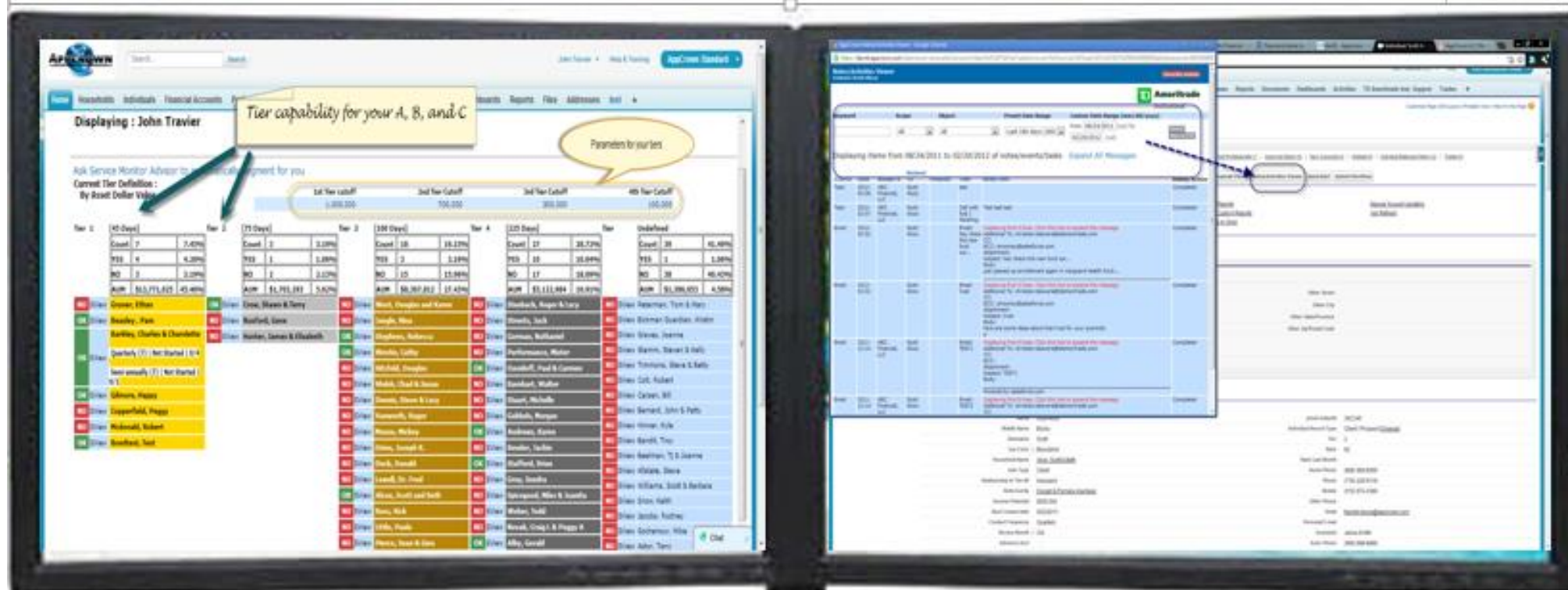
OR



Have This Solution



You have a consolidated platform integrating all your 3rd party vendors through a centralized system, integrated over a cloud based CRM



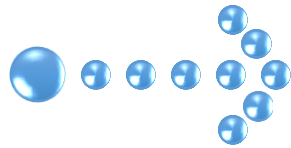
CONNECT WITH YOUR BOOK OF BUSINESS THROUGH DYNAMIC SEGMENTATION AND INTERACTIVE SERVICE MONITORS

“Scaled simply for financial advisors and their entire staff”



“An integrated client experience management system to automate and scale the relationships building process”

Integration capability with industry providers into Wealth Plus



Wealth Plus



And more...

- **Install and Run – Wealth Plus fits into any customized version of Salesforce.com through an automated installation feature**
- **Enterprise Configuration – AppCrown is able to expand wealth plus to meet the customized needs of the business units, BPO processes to support straight through processing and business integrations for a centralized business system**
- **BPO integrations – AppCrown is able to integrate middle office vendors, back office technology into a centralized CRM strategy allowing for both workflow and transactional transparency throughout the sales process**