POWEROFFICE™
SOLUTIONS FOR BACK OFFICE OUTSOURCING

POWERTRADE™
SOLUTIONS FOR REBALANCING & TRADE AUTOMATION

PowerInvestmentTools™
SOLUTIONS FOR INDEPENDENCE

POWEROFFICE

Turn-key services will streamline office operations and enhance services you provide your clients.

Data Management Services

- Data downloads from all major custodians
- Data scrubbing, activity posting & account reconciliation
- Corporate action processing
- Report production & invoice production
- Data cleanup projects

Back Office Services are available for PowerAdvisor and other major PMS applications - call for more information.

Data Conversion Services

Cornerstone offers several data conversion services options to best suit your needs and budget.

- "JumpStart" a database for immediate use by initializing PowerAdvisor with client account & asset information on a specific date.
- Basic conversions populate a new PowerAdvisor database with data from an existing application or historical data files
- Performance history conversions initialize a new PowerAdvisor database with performance records produced from an existing application or spreadsheet records. This solution provides account-level returns from inception at a fraction of the cost that is typical of transaction-based conversions.

Data conversion services are available for all major PMS platforms including Advent/Axys, PortfolioCenter/ Centerpiece, Techfi, dbCams, Advisors Assistant & others.

POWERTRADE

Increase trade desk productivity with automated portfolio rebalancing and trade order processing.

Asset Allocation

- Create & maintain unlimited portfolio models
- Apply single or multiple models for superior flexibility
- Allocate & rebalance accounts, households, globally & individual securities
- Models support most security types including stocks, bonds & mutual funds

Trading & Order Execution

- Raise or invest cash while maintaining balance to model
- Trade through multiple custodians & generate trade lists for execution
- Export trade orders for manipulation in other systems

Compliance & Reporting

- Document & maintain client allocation policies
- View trading restrictions prior to execution
- Generate reports & trade tickets for compliance & internal use

Manage more accounts in less time with greater accuracy by automating the most time-consuming tasks typically associated with portfolio rebalancing and trade order generation. PowerTrade integrates seamlessly with PowerAdvisor, or can be used in conjunction with other PMS systems - transactional downloads are not required.

Solutions for Managing the Complexities of Your Practice- Now and in the Future

- **PowerAdvisor**
  Solutions for Portfolio Management
- **PowerPortal**
  Solutions for Online Client Access
- **PowerCentral**
  Solutions for Best of Breed Integration
- **PowerOffice**
  Solutions for Back Office Outsourcing
- **PowerTrade**
  Solutions for Rebalancing & Trade Order Management

CORNERSTONE REVOLUTIONS INC.™

Asset Management Tools and Services for the Professional Investment Advisor

For additional information, visit www.PowerInvestmentTools.com

POWERADVISOR™
SOLUTIONS FOR PORTFOLIO MANAGEMENT

POWERPORTAL™
SOLUTIONS FOR ONLINE CLIENT ACCESS

POWERCENTRAL™
SOLUTIONS FOR BEST OF BREED INTEGRATION

POWERADVISOR

PowerAdvisor's open architecture provides feature-rich functionality that maximizes productivity and profitability.

Asset Allocation Models

- Model by security type, asset class, industry, sector or individual security

Billing Features

- Create flat fees, minimum fees, unlimited tiering scenarios & project bills
- Exclude assets from billing calculations
- Bill on individual accounts or groups

Compliance Solutions

- Suite of 18 audit-ready compliance reports developed with State & Federal experts

Data Management & Custodial Interfaces

- Interfaces available for all major custodian platforms
- Easy data downloading & processing
- Pre-formatted MS Excel templates for import of spreadsheet data

Data Security & Control

- Desktop application for optimal security & control
- Assign logins, passwords & create permissions
- Limit user access to specific accounts

Data Viewing & Accessibility

- View client assets & tax lots from main screen
- Extensive filter & sorting capabilities

Prices

- Create historical price graphs for individual securities
- Free & fast retrieval of equity prices through Yahoo! Finance

Reporting

- Reports for compliance, performance, holdings, transactions & management
- Batch reporting & multiple output options including .pdf, .xls & .doc
- Browser-based reporting through MS SQL Reporting Services

Securities & Benchmarks

- Unlimited security types, asset classes, industries, & sectors
- Create indices or index blends with indices, securities or blends of both

Tax Lot Accounting

- FIFO, LIFO, high cost, low cost & specified lots
- Standard & double category average cost on mutual funds

POWERPORTAL

PowerPortal provides secure, customized web portals for viewing and retrieval of reports and other documents.

Access & Security

- Access, view & print remotely from any internet connection 24/7
- 256-bit SSL encryption protection with confidential ID's & passwords

File Uploads & Document Storage

- Seamlessly integrate with PowerAdvisor for automated work flow processing & batch uploads
- Store documents in most file formats including Word, Excel, PDF & text files

Firm Branding & Feature Options

- Brand the portal with your firm logo, colors & design elements
- Add features such as animation, slideshows, newsletters & news

POWERCENTRAL

Bringing together a blend of products, services and tools to broaden your firm's capabilities and increases efficiencies, PowerCentral is an end-to-end solution with integrations to platforms most commonly used in practice management.

Integrated Tools

- CRM data exchange with Redtail CRM, Protracker & Junxurei
- Financial Planning with export to MoneyGuidePro
- Research & Analytics with export to Morningstar

Alliance Partnerships

- Compliance affiliates offer products & services to new advisors & existing firms.
- Website Design & Optimization including hosting, SEO projects, web solutions, ecommerce & more.
- Marketing & Graphic Design for collateral development, blogs, mail campaigns, website content, logo development & more.

sales@PowerInvestmentTools.com

Cornerstone Revolutions, Inc.
18101 SW Boones Ferry Rd., Ste.100, Portland, OR 97224

www.PowerInvestmentTools.com
Phone 503.968.7202 - Fax 971.249.7202