FirstClearing

**Video Transcript – SmartStation®**

*(**Graphic Overlay:** First Clearing on SmartStation®)*

*SmartStation*

A technology platform designed to help you build and strengthen relationships.

Comprehensive and fully integrated, with single-sign-on access – to meet your needs – and the needs of your clients.

Powerful applications to help you save time, increase productivity and deliver exceptional service. Technology that helps you work more efficiently to build greater client loyalty.

Growing your business is front and center, get daily servings of relevant and timely news and automated one-click client opportunities with My Homepage.

Dynamically analyze your book to target and interact with specific groups of clients. Use one of dozens of pre-built report filters, or create a custom list using the criteria you define.

View your business in new ways to see what drives your revenue. Robust client segmentation and business planning tools help you optimize your practice and plan for growth year after year.

Nurture client relationships with a fully integrated contact management system that helps you organize and quickly access important client information. Automating many of your day-to-day activities helping you spend less time managing and more time focusing on your clients.

*(**Graphic Overlay:** Words superimposed on computer screen: Add New Prospect; Schedule Calendar Events; Run a Report)*

For impromptu client interactions and reviews, quickly email or print a consolidated snapshot of their finances to set the stage for productive conversations.

Other time-saving features include the flexibility to service multiple clients at the same time. The ability to enter multiple equity orders for a single account and more complex option orders.

(***Graphic Overlay:*** *The Envision® Process)*

To help you put clients' financial pictures in focus, tap into an innovative investment planning tool that combines goals-based guidance with statistical modeling, so you can connect with clients on a deeper level.

And when clients need to know how their investments will work for them in retirement, show their income possibilities – now – at retirement – and for years down the road.

Use the powerful Research Center to address client questions, and keep the conversation going with the latest research from third-party providers and recommendations from the Wells Fargo Investment Institute.

It's all available at your fingertips, on the go, to give you an edge when preparing for client meetings and staying connected to your team.

Your clients also benefit from the flexibility of online access to account, performance, and investment plan information.

Technology designed to do more than just run your business more efficiently. It's built to work the way you do, to grow and strengthen your relationships – and help you – help your clients succeed financially.

SmartStation®

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