

## On-Demand Sales and Marketing Optimization for Mutual Fund and Wealth Management Organizations

Angoss FundGUARD is an On-Demand predictive sales and marketing solution empowering fund distributors to increase assets under management while reducing redemption risk. Angoss FundGUARD leverages Angoss' industry-leading predictive analytics capabilities to align sales and marketing strategies according to sophisticated segmentation and purchasing and redemption behavior. Delivered through a business-friendly web portal, Angoss FundGUARD produces predictive leads and actionable reports highlighting clients and advisors with predicted purchasing or redemption activity.

### Segment your Advisors and Clients to Optimize Sales and Marketing Strategies

Angoss FundGUARD segments your financial advisors according to how they buy, hold and redeem your investments. By tracking the size of each segment and their average assets under management, Angoss FundGUARD provides insight into how your client base is developing over time, and provides you with a solution to optimize your sales and marketing strategies based on the profile of your client segments.



*Dynamic reporting and interactive dashboards provide powerful insight to the development of advisor segments and sales productivity.*

### Increase Assets Under Management and Reduce Redemption Risk

The predictive reporting features offered by Angoss FundGUARD highlight financial advisors that are most likely to buy or redeem in the near future, allowing sales teams and marketing professionals to target their accounts strategically to either sell additional product or reduce redemptions.

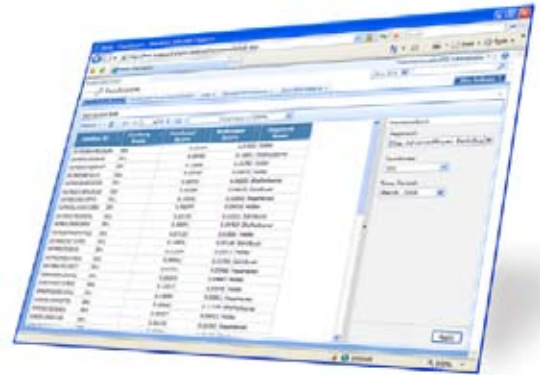
Resulting prospect data integrates with Salesforce.com, SalesPage, SalesLogix, Microsoft Dynamics or other CRM platforms, ensuring fast, high impact deployment of advisor analysis and targeting tools to inside and field sales representatives. Sales management benefits from coverage reports with drill-down detail, boosting sales productivity by highlighting lead coverage by territory and segment.

#### Key Benefits

- Increase assets under management and reduce redemption risk
- Optimize your sales and marketing strategies with advanced client segmentation
- Manage your technology costs with a fully hosted, software-as-a-service solution

## Manage Technology Costs and Distribute Access to Business Users with a Fully Hosted Solution

As a fully-hosted software-as-a-service solution, Angoss FundGUARD allows you to manage your technology costs while providing remote and distributed teams with familiar, browser-based access to analytics reports, lists and dashboards, with instant visibility to changes in data and a robust set of user-friendly tools to refine searches and generate results. The security model allows you to control who within your organization has access to Angoss FundGUARD and control what types of data and features are available to each user.



*Angoss FundGUARD allows personal or territory lead lists to be generated for predicted purchasers or redeemers in the next 30 days*

### Comprehensive Feature Set

- Sophisticated predictive analytics solution for fund distributors
  - Apply analytics to segment your financial advisors and clients according to purchasing, holding and redeeming behaviors
  - Predictive list generation highlights purchasers and redeemers in the next 30 days; reports easily exported in a variety of formats, including Microsoft Excel
  - Management reports and dashboards provide insight to lead coverage, territory management and sales performance
- Fully hosted web portal environment
  - No server hardware or client software to maintain or costs to manage
  - Business-friendly and familiar web-based application provides easy access for distributed teams and instant visibility to changes in data
  - Angoss FundGUARD provides you the means to manage your portal users and grant or limit access as your business requires

#### Key Features

- Market-proven solution segments financial advisors and clients according to purchasing, holding and redeeming behaviors
- Predictive list generation highlights purchasers and redeemers in the next 30 days
- Leads and opportunities integrate with Salesforce.com, SalesPage, SalesLogix, Microsoft Dynamics and other CRM platforms, ensuring fast, high impact deployment of advisor analysis and targeting tools to inside and field sales representatives
- Management reports and dashboards provide insight to sales and executive leadership on lead coverage, territory and sales performance

### Flexible Deployment Options

Angoss FundGUARD can be deployed as an on-demand subscription or software license.

For more information about Angoss FundGUARD visit [www.angoss.com](http://www.angoss.com).

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