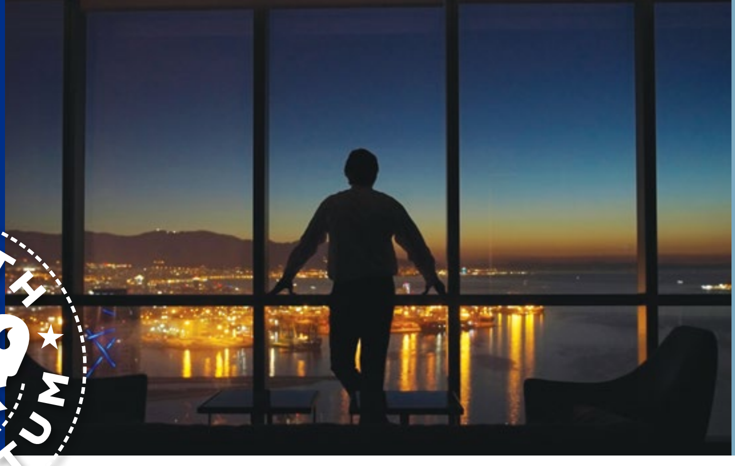
WEALTH PRODUCTS AND SERVICES



CLEARING SERVICES

At HilltopSecurities, we're here to help you grow your practice. We offer you the tools you need to scale your business so you can focus on serving your clients. Explore our popular tools:

ENVESTNET

Envestnet is our core advisory platform and offers a broad range of solutions and product integrations to help financial professionals run a more efficient practice. Envestnet enables you to build proposals, maintain models, and trade on client portfolios. Learn more about Envestnet here.

PERFORMANCE REPORTING AND ADVISORY FEE BILLING

HilltopSecurities' Advisory Services Group (ASG) provides performance reporting and advisory fee billing services. Fees can be calculated in advance or in arrears quarterly, and ASG can support billing on an individual or household basis.

MONEYGUIDE ELITE AND MYBLOCKS

MoneyGuide Elite is a goal-based financial planning tool that allows you to build complex plans for your clients. Able to integrate directly with Envestnet, you can leverage MoneyGuide's many solutions to build a plan that truly reflects a client's goals. Additional solutions such as MoneyGuide's MyBlocks can simplify a complex plan into achievable steps. Learn more about MoneyGuideElite here.

ENVESTNET CLIENT PORTAL

The Envestnet Client Portal uses account aggregation to provide an updated view of a client's financial picture. Clients can link multiple outside accounts to this portal, allowing them to track their entire financial picture in one spot. It integrates with MoneyGuide, allowing you to access up-to-date outside account data when creating financial plans. Learn more about Client Portal here.

MORNINGSTAR ADVISOR WORKSTATION

Morningstar offers industry-leading financial research and reporting capabilities, enabling you to perform security research and analyze client portfolios. Morningstar Advisor Workstation also allows for hypothetical portfolio illustrations and integrates with MoneyGuide for seamless planning. Learn more about Morningstar Advisor Workstation here.

CFRA MARKETSCOPE ADVISOR

CFRA's powerful research tool provides robust intra-day market commentary, news, investment research, and analysis. Learn more about CFRA here.

ICE SUITE

The ICE suite of products is an ecosystem that provides access to a range of real-time quotes, data, and analytics for global markets in order to support trading and portfolio research. Learn more about ICE here.

REDTAIL CRM

Redtail CRM is specifically designed to support financial professionals. Redtail helps you streamline your business and offers tools to help you stay organized and on top of communications. Redtail also integrates with Envestnet to pull client information. Learn more about Redtail CRM here.

ENVESTNET INSIGHTS ENGINE

Envestnet's powerful data analytics tool can analyze your clients' financial data to uncover hidden opportunities and get actionable insights for next steps. This tool can identify accounts with high-risk asset concentrations, out-of-the-money annuities, unrealized losses, and more. Learn more about Envestnet Insights Engine here.

HilltopSecurities
Clearing & Custody

CLEARING SERVICES

CONTACT US

Please reach out with any questions regarding product costs and implementation, or if there are any other tools that would be helpful for your practice.

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