Minuteman Advisor Services Platform

Minuteman Advisor Services

INTERNET SOFTWARE

The Minuteman platform is a secure online solution, so you and your clients can access portfolio data from anywhere.

CUSTOM SOLUTIONS

Minuteman provides risk assessment tools and a Monte Carlo analysis of retirement income needs. Build your own asset allocation models or modify one of the 18 templates provided.

PERSONAL ATTENTION

We provide one-on-one training for all new customers and offer ongoing technical support by phone or email, in case you ever encounter any difficulties. And should you need to change your custom web page, we'll do it at no extra charge.

SOFTWARE FOR THE INDEPENDENT RIA

As an investment advisor, your primary task is to monitor your client portfolios – even periodically rebalance them. But your clients also require personal time and attention. You shouldn't have to juggle valuable "face time" with "back office time" to provide the high level of service today's investor demands. Minuteman Advisor Services has your solution. We think you'll agree: your client assets deserve daily monitoring with a sound rebalancing discipline and low fees.

Minuteman is a software program that monitors your passive (index) portfolios every minute, and automatically rebalances the asset mix at the moment it becomes too askew. This way, your client 's risk tolerance is always maintained. We call it "active monitoring of passive management."

A patent-pending rebalancing system, FLEXbalance, is the heart of the Minuteman software platform. You have complete control over portfolio asset allocation, security selection, and determining the tolerance bands (variance) for triggering rebalancing.

Passive management is a time proven strategy and Minuteman software allows you to keep costs down through automation and integration with your broker or clearing firm. Minuteman can be executed through any broker with an available application programming interface (API).

Even advisors new to asset management can use Minuteman effectively, due to its simplicity and completeness. The total platform includes presentations, a risk tolerance questionnaire, and 18 template portfolios, each with an IPS.

TOTAL PLATFORM SOLUTION

The MAS total platform includes:

Automated Rebalancing

Aggregated Reporting

Customization and Setup

Server Maintenance

Application & Data Services

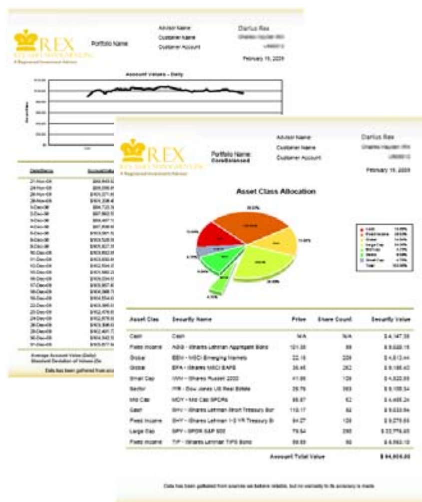
Training and Tech Support

Platform Features and Benefits

As an internet software service, Minuteman provides you with an individual server where you can set up new client accounts, check on portfolio allocation, view daily values, and review performance. You can also provide your clients with a confidential username and password to access their account information* from a customized web site that highlights you as their advisor.

You will easily manage multiple accounts through our system of "model" portfolios: changes made to a model portfolio trigger automatic adjustments to all accounts pegged to that model. Minuteman doesn't simply list needed trades: it automatically executes them. The complete platform also includes email notification of portfolio rebalancing activity, electronic trade blotter support, and more.

* Minuteman Advisor Services is a software service only. Advisor is solely responsible for account setup, portfolio selection and activity, as well as the establishment of user passwords. Please see the Minuteman software license agreement for complete disclosures.



Screen shots are representative samples.
Your custom site and reports will vary.

Setup Requirements

- You must be a registered investment advisor (RIA) with discretionary account trading privileges.
- Microsoft Windows with high-speed internet connection and Internet Explorer browser recommended.
- All advisors must sign a Software License Agreement and pay the initial setup fee (if applicable).
- Minuteman can only be implemented through a broker with an application programming interface (API). Contact us for list of current brokers.
- Advisors are asked to provide a photo and contact information, to be displayed on their custom web site.

TESTED TECHNOLOGY

Minuteman underwent thorough field testing for eighteen months. We maintain redundant power systems and internet access systems to help assure maximum uptime of critical programs.

TRANSITION SOLUTIONS

Advisors who are transitioning to ETF-based strategies or who are considering a move to being independent, will find Minuteman solutions to meet or exceed your asset management needs.

TURNKEY SOLUTIONS

Minuteman's total platform functions as "asset management in a box" for the new RIA or newly formed advisory practices. You'll have everything you need to put a professional foot forward.

CONTACT US

For more information on any of our products or services please visit us on the Web at:

http://minutemanadvisor.com

Minuteman Advisor Services

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