

PROBLEM: Too little time for personalized service

SOLUTION: Minuteman Advisor Services Platform

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.



As 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) ETF 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 for passive management."

- **EFFICIENT.** By using exchange-traded funds, clients receive the benefits of low cost, diversified, professionally selected securities that trade throughout the day.
- **EFFECTIVE.** You already know the inherent value of passive management, but immediate rebalancing when a variance is exceeded preserves desired risk levels.
- **EXECUTION.** Select a model for a client account & deploy: program does the rest!
- **EXCEPTIONAL VALUE.** Software license fee is based on the size of accounts to be monitored. Includes consolidated portfolio performance reports and custom web site.

This patent-pending rebalancing solution, FLEXbalance, is the heart of the Minuteman software platform. You have complete control over portfolio asset allocation, index ETF selection, and the tolerance bands (variance) for rebalancing.

Even advisors new to asset management can use Minuteman effectively. Passive management is a time-proven strategy and Minuteman software is already integrated with a broker/custodian and clearing firm that executes trades at just \$1 per ETF, up to 200 shares. While Minuteman can be executed through any broker with an application programming interface (API), few firms have this available and trade costs will also be higher.



Service 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.

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.

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

www.minutemanadvisor.com

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.

WHAT'S INCLUDED

Minuteman Software Solution
Customization and Setup
Server Maintenance
Application & Data Services
Training & Tech Support
All for one low monthly fee!



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