

# Technology components at a glance

TECHNOLOGY COMPONENT	SERVICE PROVIDER	BASE TECHNOLOGY COMPONENT	OPTIONAL TECHNOLOGY COMPONENT	PAGE
<b>CLIENT ACCOUNT MANAGEMENT</b>				
WaddellONE	Refinitiv	●		5
NetX360®	Pershing	●		5
NetXInvestor Client Portal	Pershing	●		5
Envestnet	Envestnet	●		6
Docupace Electronic Workstation	Docupace	●		6
COMPASS®	Albridge Solutions	●		7
Mobile Transcription Services	Various		▲	7
Vision®	DST	●		8
Client Snapshot	Waddell & Reed	●		8
Retail CRM Applications	Various		▲	8
SmartOffice Enterprise CRM	Ebix		▲	8
<b>FINANCIAL PLANNING</b>				
eMoney emX® Pro	eMoney	●		10
eMoney Advanced Analytics	eMoney		▲	10
eMoney Assistant to Planner Upgrade	eMoney		▲	11
eMoney Data Entry Services	eMoney		▲	11
<b>INVESTMENT PLANNING &amp; RESEARCH</b>				
NetX360® Premium Content	Pershing		▲	12
Morningstar® Advisor Workstation™	Morningstar	●		13
Riskalyze Investment Planning Platform	Riskalyze		▲	13
Enhanced Morningstar® Databases and Tools	Morningstar		▲	14
<b>RETIREMENT PLANNING</b>				
Retirement Calculators	Imagisoft	●		14
Social Security Explorer	Impact Technologies		▲	14
<b>INSURANCE PLANNING</b>				
Insurance Planning Calculators	Waddell & Reed	●		15
Morningstar® Annuity Intelligence	Morningstar	●		15
Subscribe® Annuity Order Entry	Pershing	●		15
<b>MARKETING &amp; COMMUNICATIONS</b>				
Digital Marketing Program	FMG Suite		▲	16
Texting	MyRepChat		▲	16
Social Media Program	Socialware/Proofpoint		▲	17
Microsoft Outlook Web Mail	Microsoft	●		17
Proofpoint™ Secure Message	Proofpoint	●		17
<b>ADVISOR INFORMATION &amp; SUPPORT</b>				
Waddell & Reed University	Waddell & Reed	●		18
GPS Sales Planning & Tracking Tool	ActiFi		▲	18
Advisor Compensation Management	Waddell & Reed	●		18

## KEY

● Base technology component. ▲ Optional technology component, which includes an additional fee.