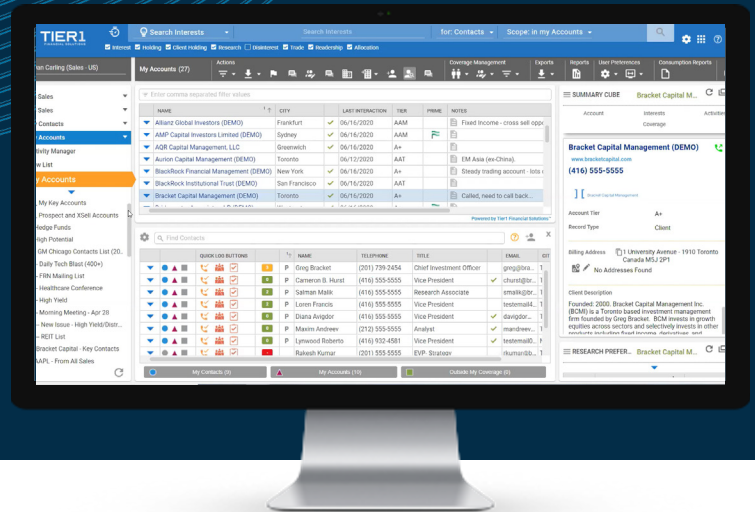


Tier1 Client Center: Build Relationships with Data-Driven Intelligence, Insights and Action

Gain a competitive edge and accelerate your relationships using leading capital markets relationship management technology and tools. Optimizing vital client data is crucial to maintaining relationships and priorities, especially with shrinking resource mandates and more stringent regulatory requirements. Respond to these changes and defend future challenges by relying on a secure and robust foundation to succeed.



A primary component of Tier1 Core for Research, Sales & Trading users, Tier1 Client Center is a comprehensive, flexible, and interoperable client relationship management (CRM) module for Capital Markets professionals. Purpose built for the global financial markets, Client Center is designed with persona driven specificity enabling each user an optimized experience. Utilize next generation automation leading you to insights that increase valuable engagement. Take advantage of a connected experience amongst colleagues and clients, and a platform designed to provide you critical, timely information and data, to take your next best action with confidence.

A connected experience delivering optimized workflows.

Client Center delivers workflow-optimized experiences, prompted insights and a centralized view of client interactions that drive revenue-generating engagements. The Tier1 Client Center module:

- Provides alerting mechanisms drawing your attention to the right relationships, the right names, the right news, and the right opportunities so you can act
- Encourages tight collaboration with your colleagues seamlessly across a unified, persona-driven experience

Utilize smart client management to increase output and mitigate risk.

Increased automation, risk mitigation, data & analytics drive your next best action. Take advantage of smart systems to help you conquer your day with the right moves at the right time. The Tier1 Client Center module:

- Arms you with prioritization tools to inform your outreach and cadence with clients based on interest, historical interactions, and market data to set engagement frequency on the contact level
- Utilizes sophisticated dashboards and notifications to set and reach measurable goals

Limit manual intervention with advanced data mapping.

Tier1's solution to Consumption Reporting isn't just a report, but a methodical response in which the mapping of customized data needs and preferences for each of your clients is already solved for you. Accurately represent what value add services you provide to your clients and stand out in regard to your broker vote/consumption by submitting your report in a timely, and format fitting fashion. The Tier1 Client Center module:

- Provides exception reporting and easy access for adjustments and correcting edits to incomplete and unacceptable interaction data
- Supports all aggregator providers preset to the acceptable and requested formats
- Grants access to an Interactions Summary Report (ISR), pulling in comprehensive interactions from core CRM activities and events platforms

Access critical data in a unified view.

Client Center 'cubes' are user-configurable views for sorting and displaying meaningful data quickly and intuitively. The Tier1 Client Center module:

- Offers several cube interfaces that provide a contextual look at specific data related to interests, activities, history, to-do lists, and scheduled interactions
- Comes with recommended pre-set cubes and allows for further customization to desktops to meet unique needs

Client Center is a core client relationship management module compatible across all Tier1 Base packages, easily configurable with other modules including Mobile, Prospector, Events, Outlook, and the Security Engine.

To learn more about our award-winning solutions, visit www.tier1fin.com or email info@tier1fin.com