



# THOMSON ONE WEALTH

Empowering advisors with intuitive, integrated  
and scalable solutions



## Refinitiv's Thomson ONE Suite

Today's dynamic and fast-paced business environment demands an efficient and nimble advisory. Thomson ONE supports and empowers advisors by combining client and market data to deliver holistic and actionable insights. Our streamlined approach boosts efficiency and frees advisors to concentrate on building and enhancing both new and existing client relationships.

Thomson ONE Wealth is a complete front-to-back-office workflow solution that seamlessly integrates with existing in-house and third-party applications to ensure effortless navigation. This enables firms to adapt to an ever-changing environment with ease and agility.



### Our Thomson ONE Wealth Solutions include:

	Thomson ONE		
	Wealth	Wealth Select	Total Wealth
<b>Global Market Data</b>			
Real-Time and Historical Pricing <sup>1</sup>	✓	✓	✓
Interactive Charts	✓	✓	✓
Market Statistics and Analytics	✓	✓	✓
Industry/Sector Information	✓	✓	✓
Symbol Lookup and Alerts	✓	✓	✓
<b>News</b>			
Top News	✓	✓	✓
Press Releases	✓	✓	✓
Refinitiv Newscasts	✓	✓	✓
Daily Newsletters	✓	✓	✓
<b>Company Overview</b>			
Fundamentals	✓	✓	✓
Estimates and Ratings	✓	✓	✓
Events and Filings	✓	✓	✓
Institutional and Insider Holdings	✓	✓	✓
Officers and Directors	✓	✓	✓
<b>Stock Reports Plus</b>			
Equity Analysis and Idea Generation		✓	✓
Objective Score for Time-Saving Insights		✓	✓
<b>Investment View Plus<sup>2</sup></b>			
Investment Selection		✓	✓
Goals-Based Planning		✓	✓
Lipper® Ratings		✓	✓
<b>PropGen<sup>2</sup></b>			
Create Client-Ready Proposals		✓	✓
Turn Recommendations into Plans		✓	✓
<b>Book Management and Client Reporting<sup>2</sup></b>			
BETA Clients			✓
<b>Mobility</b>			
Thomson ONE Anywhere	✓	✓	✓

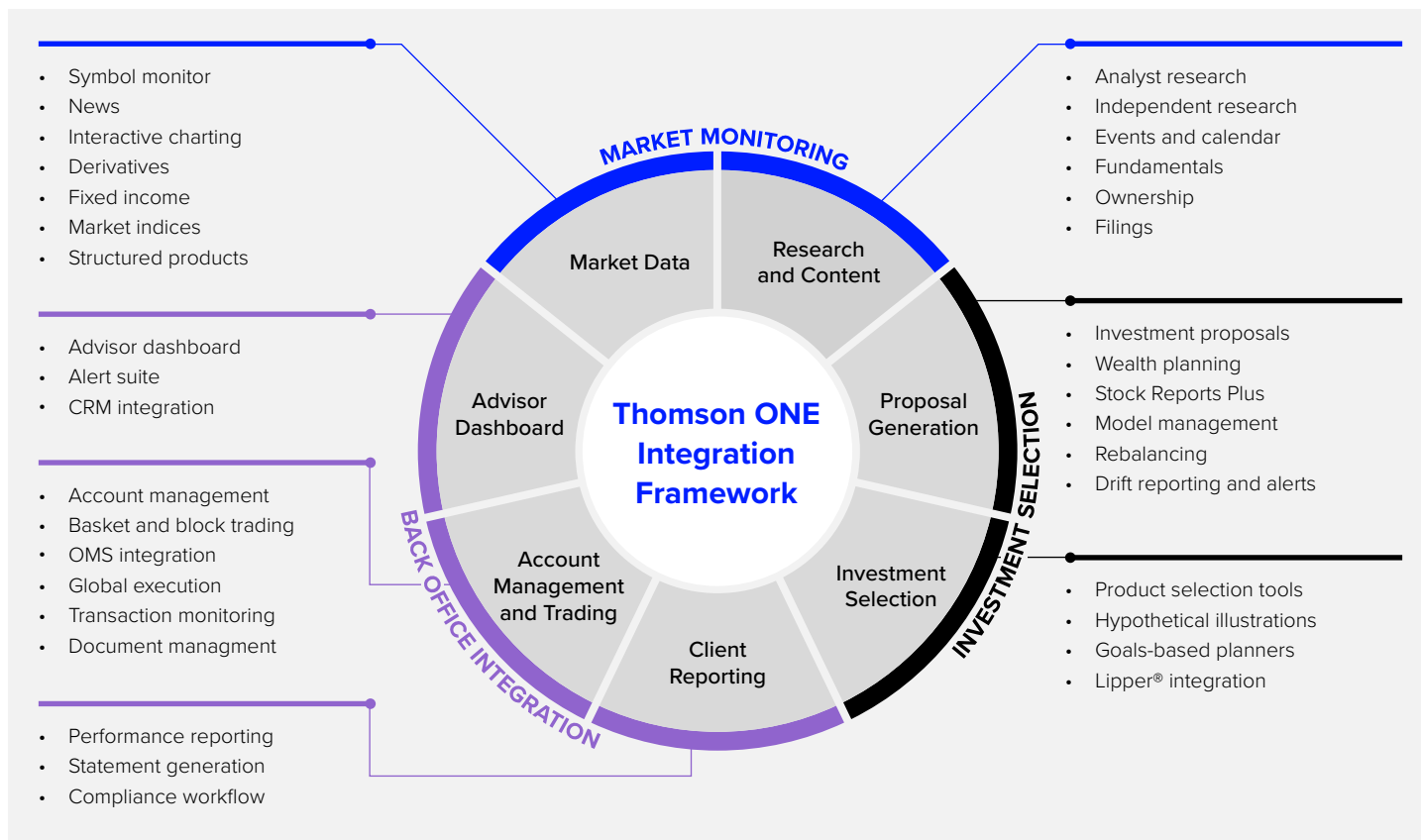
1 Fee-liable.

2 Not available in Canada.

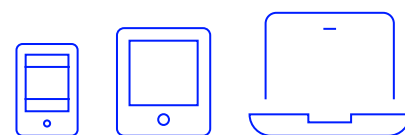
# Integration Capabilities

(For clients with 500+ users)

Our flexible framework and advanced enterprise management tools allow clients to mix and match internal, third party and Refinitiv services to meet the specific workflow needs of their end users, while also supporting a wide range of disparate financial advisor workflows.



## Access anywhere, any time



The demand for advisor accessibility continues to grow, with next-generation clients expecting seamless, on-demand interaction. Thomson ONE Anywhere delivers unsurpassed mobility and enables advisors to stay connected while on the go.

Thomson ONE Anywhere extends the desktop to mobile devices, so advisors can stay connected while on the go. Fully browser-based, it requires no installation for unsurpassed mobility.

- **Easy access from a tablet, phone or desktop**
- **Stay informed while on the go**
  - **Market data, news, company and client account<sup>3</sup> information**
  - **Watchlists synced to the desktop**
  - **Entitlements shared across platforms**
- **URL: <https://app.thomsonone.com>**

<sup>3</sup> BETA clients only.

## Market Monitoring

Track how market movements affect a client's investments

Keep abreast of market developments so that when an unexpected event unfolds, you can quickly assess the potential impact on your book of business. Sophisticated market monitoring tools allow advisors to visualize changes in a client's portfolio, compare performance against benchmarks and assess sector contributions.



### Market intelligence

Thomson ONE's global market data incorporates real-time and historic pricing, indices, options, futures, FX rates, economic indicators, industry and sector information, volume at price, short interest and reference data for insights into factors and trends driving the market, and investment behavior. (Note: real-time exchange data is fee-liable.)

Our market-leading advanced charting package delivers a concise view that makes it easy to view historical movements on a security or index, compare peer performance, visualize the impact of specific events, and apply moving averages or other indicators.

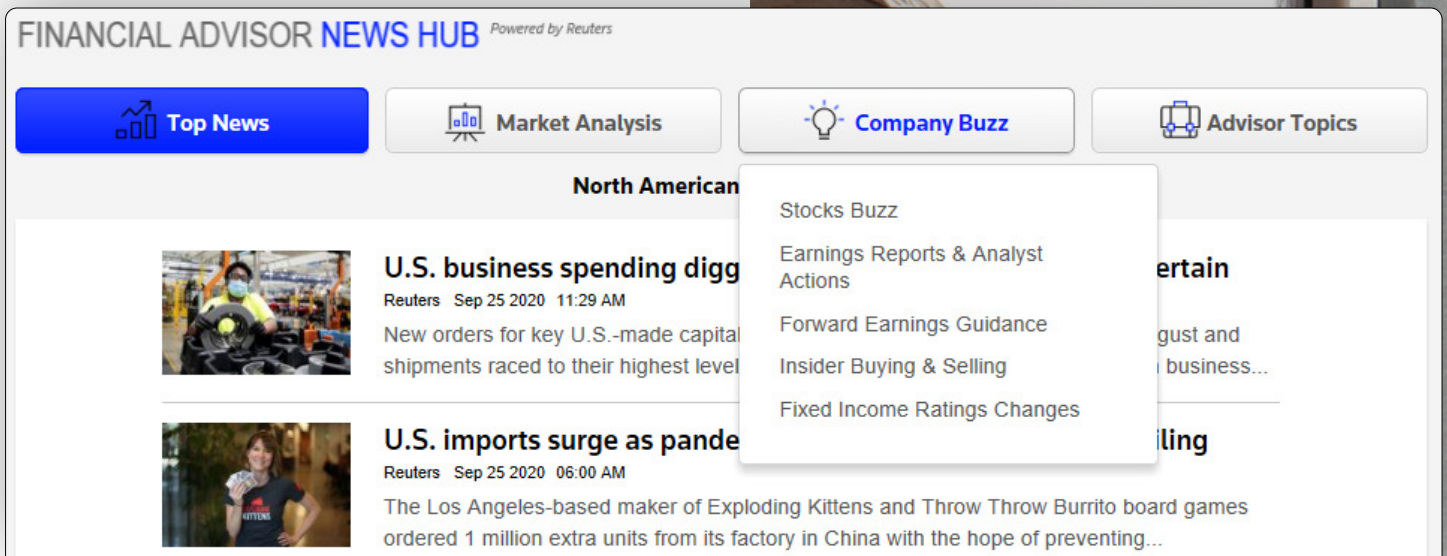
Real-time alerts can be set to monitor critical events, such as price or volume changes, liquidity events, filings, research, news or account activity<sup>4</sup>.

<sup>4</sup> Account activity alerts are for BETA clients and are not available in Canada.

### News

Our holistic news offering includes press releases to track corporate activity, Top News for the day's most important stories, Refinitiv Newscasts for market activities and trends, and daily newsletters. Quick filters allow users to narrow headlines on a symbol or watch list, while analytics-based tagging highlights stories relevant to their context and needs.





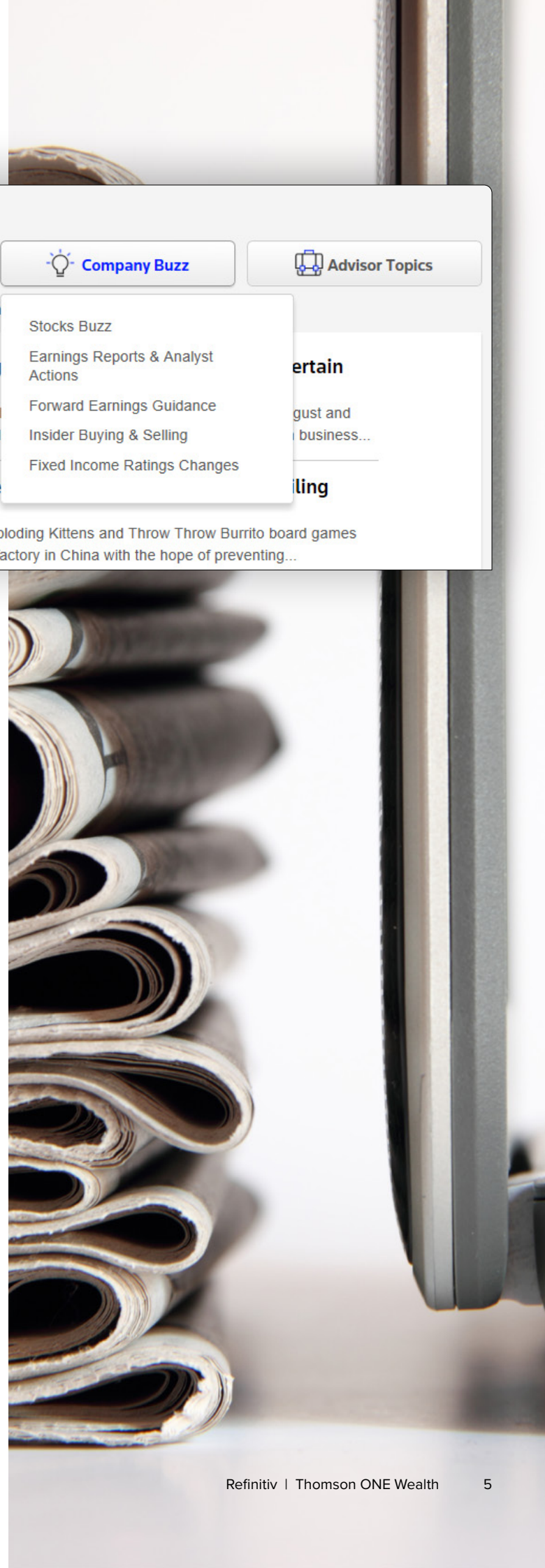
**Add-on:  
Reuters News**

Expand and enhance company coverage with Reuters News, a trusted source for market-moving news and commentary. Our Reuters experts go beyond the facts to deliver detailed insights that explain what the news means in real-world settings. This empowers advisors to formulate ideas that are aligned with their clients' goals and equips them with reasons to call.

Our Financial Advisor News Hub, included with Reuters News, highlights topics that are relevant to North American financial advisors. A simple interface with no clutter, the page makes it easy to find stories that affect your practice.

**Add-on:  
Web-Aggregated News**

Web-aggregated news provides direct access to the stories your clients are reading. Find articles on practice management, lifestyle (for example, college savings or retirement), regulatory trends, and more from popular sources such as AdvisorHub, InvestmentNews, Seeking Alpha and WealthManagement.com.



# Differentiate on Service

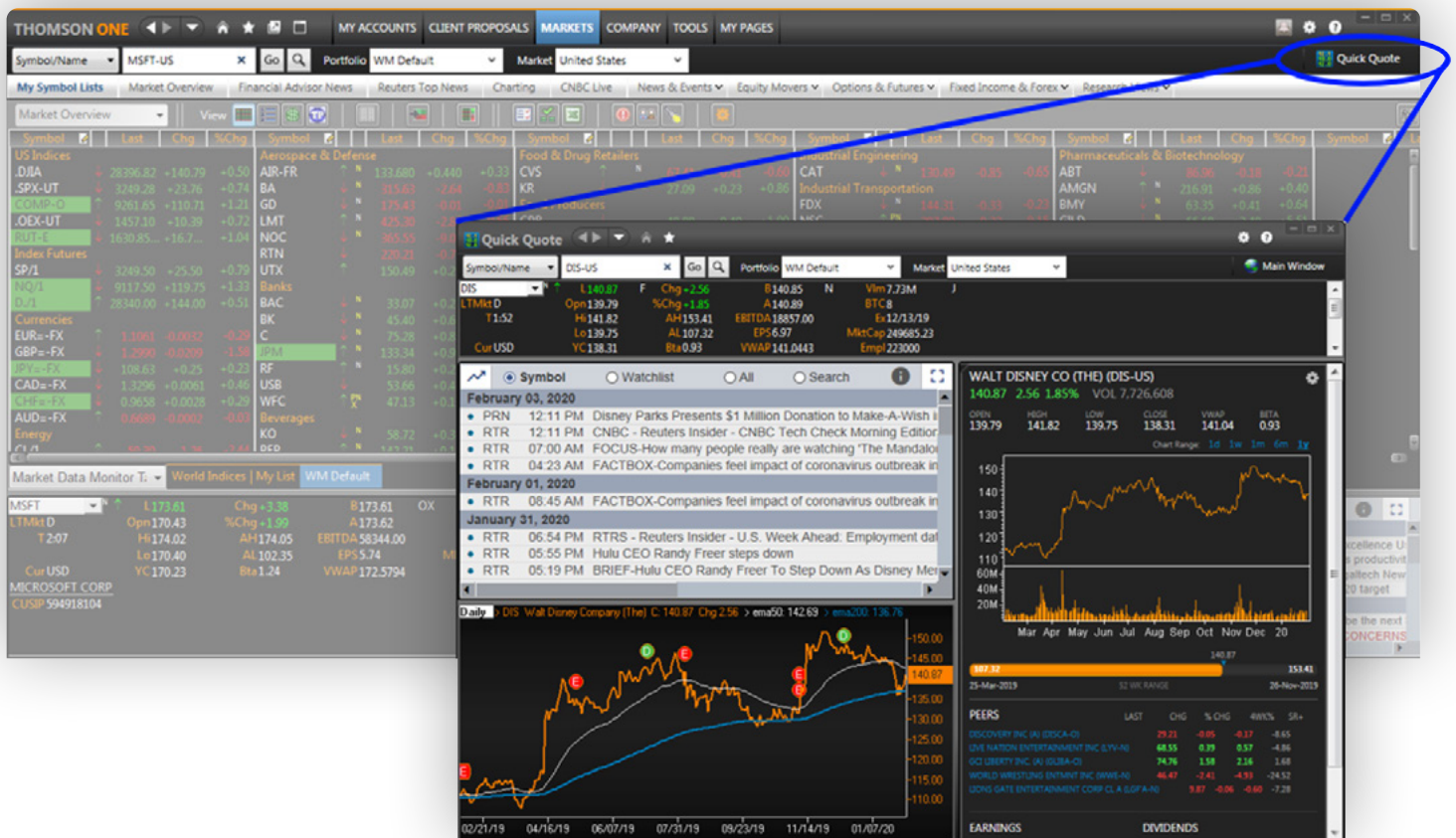
Quick access to comprehensive data

Intelligent information – our unique synthesis of human intelligence, industry expertise and innovative technology – is the key that provides decision-makers with the knowledge needed to take the right action.

Today's clients expect comprehensive, relevant information at speed. Advisors need ways to scale, to remain responsive to their clients.

Thomson ONE Wealth boosts advisor efficiency with an easy-to-use interface to quickly find patterns and create simple talking points:

- Access to unsurpassed depth and breadth of Refinitiv content, including:
  - Comprehensive company and financial views with easy access to further detail
  - Events, ownership and insider data that unpack how events affect a company's stock price
  - Consensus estimates, Refinitiv research, your firm's own proprietary research or independent research (add-on: Stock Reports Plus, CFRA) add depth to your story
- Workflow windows for multi-tasking and the ability to customize the workspace for your needs
- A "Take Action" menu to navigate to common next steps and increase efficiency



## Help clients reach their goals

### Wealth tools for winning investment proposals

#### Investment View Plus<sup>5</sup>

Investment View Plus makes prospecting easier by enabling advisors to start meaningful conversations about investing with their prospective and existing clients. Create financial goals, discover funds that match your client's investment strategies and showcase your expertise through professional grade reports – all in one efficient workflow.

Investment View Plus primarily uses Lipper Data to provide quality coverage on open-end and closed-end mutual funds, exchange-traded notes and funds, equities and indices. Through our Lipper Leader Rating System and Lipper Fund Awards program, advisors can highlight high performing securities and illustrate the benefits of investment recommendations.

##### Key features:

- Create and set financial goals with our retirement, education and goal planning calculators
- Discover securities that help attain those goals by filtering on customized security criteria in our Product Catalog Screener
- Support your investment strategies with effective, client-ready presentations that are easily understood by advisors and investors alike, through our Investment View Plus reports

#### Stock Reports Plus

Stock Reports Plus allows you to optimize your investment selection process. It is a security-specific analysis and idea generation tool that includes a proprietary stock rating that can be used to further optimize your equity investment selections and objectively support your recommendations.

These reports exceed the breadth of coverage and detail offered by many competitor products, with enhanced analysis of security pricing, valuations and fundamental metrics relative to actual market performance.

##### Key features:

- A quantitative, transparent and easy-to-understand scoring system
- Covers more than 40,000 equities across 50 countries
- Six component scores and average scores that are calculated weekly
- Current data placed in historical context for more accurate forecasting of a security's performance
- Time-saving research with text highlights of noteworthy data
- The ability to customize portfolios to track specific companies

#### Proposal Generation<sup>5</sup>

PropGen is a sophisticated sales and prospecting tool that makes it easy to create and deliver personalized multi-asset investment portfolios. It showcases financial recommendations based on firm-based products, while allowing advisors to create and edit their own custom models. Bringing your recommendations to life has never been easier. Easy-to-understand, client-ready reports, produced with minimal effort, will help you gain your customers' confidence and grow your assets under management.

##### Key features:

- Manage and support multiple investment proposals specific to security bases or asset class models
- Use the Quick Proposal feature to automatically match the model and create multi-asset investment proposals within minutes
- Rebalance your client portfolios and make product recommendations based on their model
- Use our Model Manager to create, edit and copy models
- Share your models across firms, sub-firms, groups or branch offices in addition to sharing with other users
- Access Refinitiv's comprehensive database of mutual funds, ETFs, variable annuities and stock using our product catalog

**Add-on:** Model Management and Rebalancing Tools

<sup>5</sup> Not available in Canada



## Expand your Practice

Actionable insights to create new and strengthen existing relationships



### Book Management<sup>6</sup>

Book Management provides an actionable view of personal, wealth, tasks and financial data that empowers you to identify opportunities, mitigate business risk and manage the market's impact on your client portfolios.

#### Key features:

- View your book of business holistically and in one location. Our integrated dashboard consolidates all client demographic, account, security and plan data
- Determine how the market is affecting your client portfolios, identify cash deposits for investment opportunities and generate call lists from the results

### Client Reporting<sup>6</sup>

Our Client Reporting solution delivers a suite of compelling and professional client-ready reports that can be generated on demand. With built-in logic to support regulatory disclosure requirements, the system is highly configurable at firm, branch and end user level.

#### Client reports include:

- Our Portfolio Report, which includes portfolio information and analysis for internal (books and records) as well as external (held away) assets that can be manually entered or uploaded by advisors
- Our Client Review Report, which allows users to report on net worth, current vs. target allocation, portfolio composition, unrealized gains and losses and portfolio holdings by account, asset class and security type

<sup>6</sup> Not available in Canada



# Enterprise Partnership

Refinitiv understands your business

Our fully integrated delivery teams have deep knowledge of customers' challenges and the end-to-end advisor workflow. Our team provides expertise to help you take advantage of the full value of Refinitiv solutions.



## Implementation

Customer Onboarding Specialists ensure technical readiness and manage implementation of the technical solution.

## Engagement

Customer Success Managers are your partners and dedicated advocates with Refinitiv. They guide you through the on-boarding process, ensure you have access to all support channels, and share best practices, insights, and educational resources.

## Support

Our help desks provide 24/7 support covering content, functionality and technical needs.

The MyRefinitiv portal enables self-service, with a personalized entry point to answers, product resources, notifications, software downloads, support and billing.

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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