

Bring Your Business Together on a Single Platform

An Innovative Web-Based Platform That Leverages Underlying Solutions:

- › Advent Portfolio Exchange® (APX)
- › Axyx®

Unify the Firm

- › Easy Deployment and Adoption
- › Robust Entitlement Management
- › Internal and External Integration
- › Collaborate Like Never Before

Advent Direct® is a new cloud-based platform that enables rapid development and delivery of mobile solutions essential to your business. The Advent Direct® platform leverages the power of your people, information, and systems to drive collaboration and efficiency.

Picture a typical investment firm. You might see multiple monolithic systems, each performing a different function and containing different data in different formats. Users have to learn these systems to do their jobs—in fact, the software usually dictates how they do their jobs. If people need data from another system or an external source, they have to switch systems and search for it, or go ask for it and wait.

Now imagine a completely different picture. A single platform with a common, intuitive interface, providing users access to the data they need in one place, accessible via their desktop, laptop or mobile devices, whether they're in the office or on the road.

That's Advent Direct®.

Accelerate Your ROI

Advent Direct® helps increase productivity and collaboration across your firm by reducing the clutter of applications on desktops and the time spent searching for data from multiple systems—a frequent cause of friction between teams that increases the risk of missed opportunities.

Advent Direct® is a platform for delivering solutions to support your most important activities—gathering and investing assets and delivering results. It was built from the

ground up with the front office in mind—an easy-to-use solution that allows client-facing people to focus on high-value activity and reduces their reliance on administrative support.

Unify the Firm

Providing firm-wide user access to the same platform, Advent Direct® is the ultimate communication and collaboration tool. It enables users at all levels to broadcast important information to everyone who needs to see it—for example, changes in sector weightings, client mandates, or available cash.

What's more, Advent Direct® offers solutions that are configurable and customizable to the individual job descriptions within your firm, delivering ad hoc information the way people want to see it and easy-to-manage guided workflows.

Collaborate Like Never Before

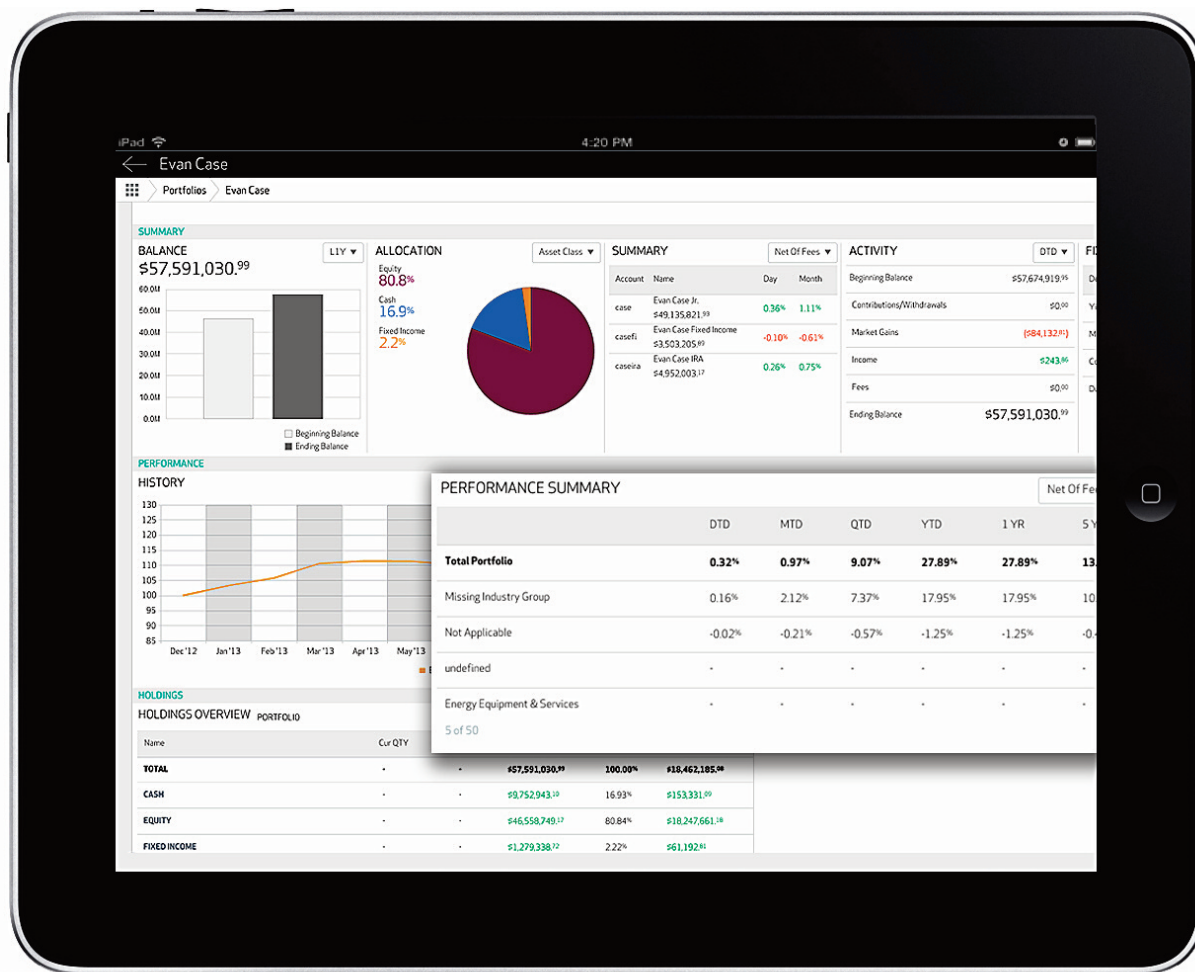
Your business isn't confined to the walls of your office. Advent Direct® provides new ways to share information and collaborate externally, allowing for the creation of a shared infrastructure to drive timeliness and operational efficiencies.

The Data You Need, the Way You Want It

Advent Direct® provides powerful data visualization and presentation tools via web content tiles. Users can quickly and easily construct views of the information they want and get the answers they need—whether at the management level (“How’s my business doing?”) or at the job level (“What important tasks do I have today?”).



Product Brief



Anytime, anywhere access to in-depth information on holdings and performance lets you stay in touch on the go.

Advent Direct® also provides content management functionality that can link data directly to client agreements, contracts, reports, and other documents. With notifications and alerts configured to what matters to your business, you can operate on an exception-based model, reducing distractions and focusing your energies and resources on the things that make a difference to the success of your business.

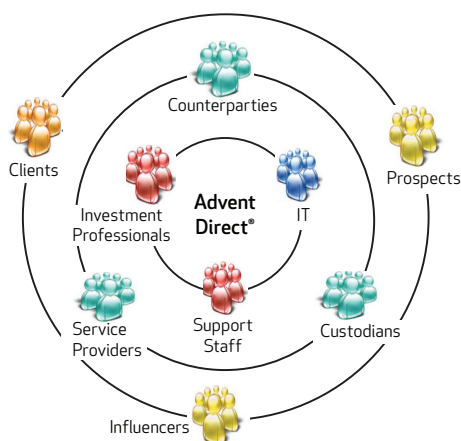
Built on Industry Leading Technology

Advent Direct® is built on an open architecture that is designed to optimize performance while using advanced security measures to protect your data. It leverages industry-leading cloud technologies to deliver:

- › Optimal availability
- › Dynamic elasticity and scalability for your firm
- › Data redundancy
- › Advanced security measures with strong encryption
- › Standardized data dictionary for financial services
- › Metadata layer leveraging domain knowledge of financial services in one common descriptive language
- › Open access to your data through the latest mainstream query and web visualization methods

Advent Direct® makes data accessible via desktop, laptop, or mobile devices. Users access data without downloading or caching.

Collaborate with Clients and Prospects



Easy Deployment and Adoption

As a cloud-based platform, Advent Direct® can be implemented quickly and easily. If you are on the latest release of Advent Portfolio Exchange® (APX) and your data is of good quality, getting up and running is a fairly straightforward process—faster and easier than a conventional software installation. Advent Direct® does not require the migration of data from your underlying Advent applications, which greatly simplifies implementation. This ease of implementation enables you and your firm to start realizing the benefits of the solution within a short time frame.

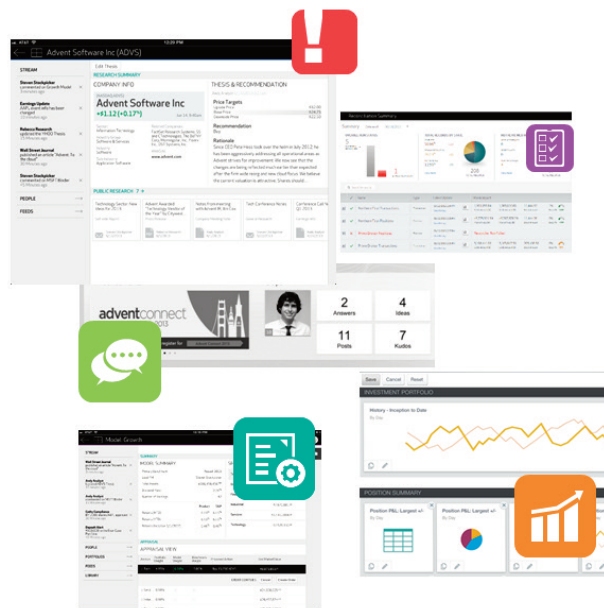
By separating data and workflow visualization from the underlying accounting, Advent Direct® allows you to assimilate enhancements to front office tools. You can combine data from multiple systems for a more personalized experience. In addition, decoupling Advent Direct® from the back office system provides flexibility to IT in managing their product stack and servicing the organization. You can change any system “behind the scenes” with minimal impact on your day-to-day business or client service, while people keep accessing the information they need through the same interface.

Empower Your Front Office

Advent Direct® empowers front-office staff to collaborate easily and work more effectively.

“Advent Direct® is a game changer.”

Duane D’Orazio
Managing Partner
Conestoga Capital



“Advent is moving toward the future with its technology, and we wanted to show our clients that we’re moving forward as well.”

Elsate Badushov

Vice President of Operations
Wilkinson O’Grady & Co.

A Platform for Building Your Business

Advent Direct® provides a platform for solutions that support the success of your people and the growth of your business. Advent plans to develop and roll out solutions together with clients with the goal of improving productivity, effectiveness, and collaboration firm-wide.

Advent Direct® breaks down barriers between people, systems, and information. It equips people with the information and tools they need to do their jobs more effectively and productively. It drives collaboration and frees people to focus on high-value activity, clients, and prospects. And it does all that on a cloud-based, open architecture that makes it easy to implement, operate, and configure to your firm’s unique requirements.

It is, quite simply, a whole new way to work. Your way.

Learn More

Contact sales@advent.com to learn more about Advent Direct®.

Who We Are

Over the last 30 years of industry change, our core mission to help our clients focus on their unique strategies and deliver exceptional investor service has never wavered. With unparalleled precision and ahead-of-the-curve solutions, we’ve helped over 4,300 firms in more than 50 countries—from established global institutions to small start-up practices—to grow their business and thrive. Advent technology helps firms minimize risk, work together seamlessly, and discover new opportunities in a constantly evolving world. Together with our clients, we are shaping the future of investment management. For more information on Advent products visit <http://www.advent.com>.

Join the Conversation



ADVENT SOFTWARE, INC.

[HQ]
600 Townsend Street
5th Floor
San Francisco, CA 94103
+1 800 727 0605

www.advent.com

[NY]
1114 Avenue of the Americas
33rd Floor
New York, NY 10036
+1 212 398 1188

Copyright © 2014
Advent Software, Inc.
All rights reserved.

PBDIRECT0614

[HK]
The Entertainment Building
31st Floor Suite 3118-20
30 Queens Rd, Central
Hong Kong
+852 3103 1000

Advent, the Advent and logo composite, Advent Software, Advent Direct, Advent Portfolio Exchange, and Axys are registered trademarks of Advent Software, Inc. All other products or services mentioned herein are trademarks of their respective companies. Information subject to change without notice. Printed on recycled paper.

[UK]
127-133 Charing Cross Road
London WC2H 0EW
+44 20 7631 9240