

Dow Jones Adviser Publisher

Intelligence your advisers can use to drive asset growth and consolidation



To grow and consolidate client assets, advisers need to build client loyalty. Frequent contact on both financial and personal matters makes clients feel valued and in turn, fosters loyalty. In addition to holding meetings and conversations about investment strategies and portfolio performance, the best advisers provide intelligence to help their clients understand current issues that can impact their financial objectives and plans.

Dow Jones Adviser Publisher offers advisers a robust selection of the most current and trusted intelligence available. Marketing teams can use this off-the-shelf publishing tool to create a centralized library of custom newsletters that can be selected and used by advisers. Independent advisers can create their own personalized newsletters and deliver customized news to their clients.

Key features:

- **Intelligence** – most trusted news and information, enriched by insight and technology, aggregated in one location
- **Compliance** – compliant for marketing teams with a compliance approval process (coming in December)
- **Customization** – selected content from The Wall Street Journal, Barron's, SmartMoney, MarketWatch and Dow Jones Newswires
- **Personalization** – firm logo, white labeling or adviser's picture and contact information
- **Distribution** – from one adviser/team to many clients with flexible distribution options

Key Benefits

A financial services firm can now deliver co-branded intelligence to their sales force focused on sales objectives and marketing campaigns. Centralized marketing teams can develop a series of newsletter versions across key topic areas that advisers can send to their clients. A compliance process will soon be part of the offering and will allow advisers to build their own custom newsletters.

Advisers will gain a competitive edge in a tough market environment by using Dow Jones Adviser Publisher – it will make them look smart and knowledgeable to their clients.

By delivering the right intelligence to the right client at the right time, advisers will experience more frequent and regular contact with their clients. Story selection allows the

adviser to align in-depth news, commentary and analysis with the client's financial goals and objectives without information overload or product push.

Dow Jones serves up intelligence most relevant to advisers through Adviser Publisher, offering more than 12,000 stories a day with a 400-day archive. Advisers can be more proactive by using the intelligence to help clients identify – and prepare for – emerging trends and issues.

The Wealth Management Edge
from Dow Jones

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View all articles

In this Newsletter:

- Retirement Strategies
- Estate Planning
- Cultivating the Affluent Client
- Practice Management
- Tomorrow's News Today web link

Click here for more information.

To learn more about Dow Jones communications capabilities click here.

Attract and retain affluent clients by becoming an essential partner with them. Dow Jones helps you stay ahead of the markets with breaking financial news, information and insights not found anywhere else. To create loyalty you need to demonstrate your und

Retirement Strategies

RETIRING: Retirement-Plan Recovery Still Far Off
Dow Jones News Service, 7:27, 5 August 2009, 594 words . (English)
Happy days are here again, right? After all, the markets are up, Americans are twittering happily about their 401(k) accounts, and life is good, right? Not so fast.

Firms and advisers can select stories for clients from:

- Tax strategies
- Retirement planning
- Alternative investments
- Emerging markets
- Estate planning
- Long-term care
- College funding
- State of the economy
- Global market trends

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The Client's View

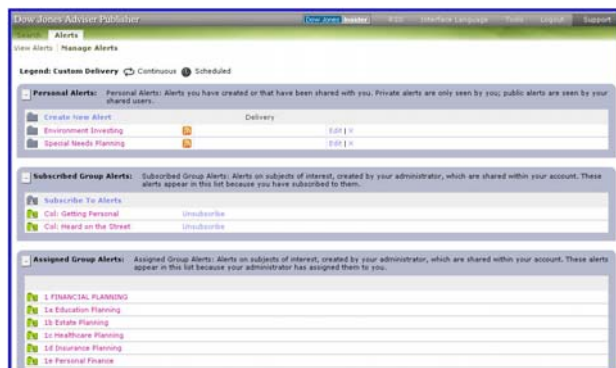
"At least 94% of high-net-worth investors (\$500,000 to \$10 million) feel it's important for their advisers to use the most reliable financial news source, and 74% prefer Dow Jones over all other sources."

2008 U.S. Affluent Investor Study

Find the Right Intelligence

Provide the right intelligence and news to your advisers and clients at the right time – daily, weekly, monthly or quarterly.

Set up alerts to help surface the most important information aligned with your business and objectives, then include in the newsletters the articles most important to advisers and their clients.



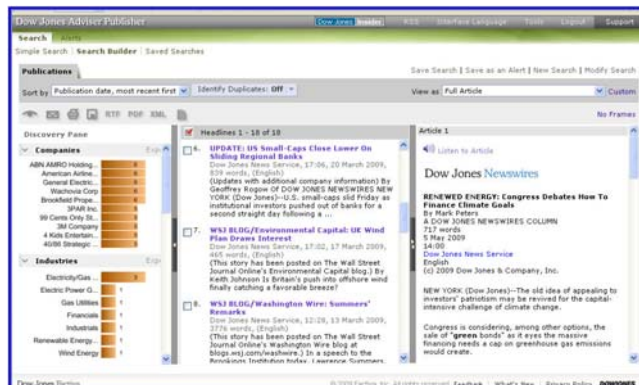
Create the Newsletter

Creating an intelligent newsletter that meets the needs of clients is easy. Select from a library of preformatted templates or develop new ones in just a few clicks to add:

- Your firm's logo
- Important headlines
- Web links
- Photo of adviser or team
- Masthead
- Table of contents linked to your stories

For more information about Dow Jones Adviser Publisher, please contact us at solutions.dowjones.com/clients.

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Organizing stories is simple: just drag and drop. Then save in HTML, PDF, RTF or mobile-friendly format and distribute to your advisers or clients.

Distribute Intelligence Anywhere

Newsletters can be sent to advisers or clients however they prefer to get them – the options are virtually limitless.

- Mobile (headlines only)
- Mobile
- RTF
- PDF
- Embedded HTML (emailed by Factiva)
- HTML
- Create a Widget (updates with your newsletter)
- Create an RSS

Dow Jones Adviser Publisher

Select and use intelligence and insight to build more loyal relationships with your clients, drive your business and grow assets. To learn more about Dow Jones Adviser Publisher, please contact us at solutions.dowjones.com/clients.