CAMBRIDGE TECHNOLOGY ADDENDUM

For $275 per month, the Cambridge Technology Fee supplies advisors with an all-in-one technology package, including CLIC®, our comprehensive online business platform, and other customizable tools. These simplify processes and provide integrated solutions for clients, enhancing advisors' businesses.

This package is a testament to our commitment to providing advisors with the best possible tools to service their business.

CLIC Dashboard	• Centralized location to view, filter, group, and export data related to your book of business
CLIC Advisor – extension of CLIC powered by eMoney	• Unlimited secure storage vault • Advanced analytics, financial planning, spending, and budgeting • Mobile web access for clients • Client marketing materials
CLIC Client	• Account aggregation • Goals-based financial planning • Lead capture • Analytics
Clearing Services	• Clearing available through Fidelity Institutional®, Wealthscape®, and Pershing NetX360+® o eSignature integration o Institutional trading
Client and Account Servicing	• Add, edit, and search clients and account data for new account opening and updates • Account forms generation • Straight through account open processing • Electronic supervision sign-off • eSignature • Automatic open for most brokerage account types at clearing firms
Compensation Services	• Option to utilize Payment on Demand system for out-of-cycle ACH/EFT payments (advances) • Real-time interactive compensation reporting
Compliance Services	• Advertising submission and review • Correspondence submission and review • Trade review • Checks and receivables blotter and direct trade blotter • Encryption • SmarshEncrypt • Hearsay or MyRepChat for compliant texting

Imaging Services and Document Storage	• Web-based document image capture and submission to home office • Search and retrieve account paperwork • Store and retrieve other client documents (e.g, wills, tax returns, meeting notes)
Managed Account Services	• Fee Billing • WealthPort®
Retirement Center	• Centralized location to view 401(k) plans
Office Services – Back-office Ecosystem	• Paperwork status monitoring • Service tickets with document upload • Client encryption • Compensation reporting • Electronic submission and document retrieval • Transparent service tracking

With questions, contact your Business Development Director (TheFeeExperts@cir2.com) at 877-688-2369.

CAMBRIDGE
You control the journey.®

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