

# PRIMAGUIDE *PLUS*

PrimaGuide Plus is a unique solution for independent wealth managers that value detailed due diligence and advanced asset allocation techniques, yet don't have the unlimited time and resources it takes to:

- Perform hundreds of **on-site interviews** with key investment professionals
- Scour the universe of managed account strategies in addition to traditional and non-traditional mutual fund strategies to identify those with the **best prospects**
- Collect investment manager questionnaires and establish a **multi-factor evaluation process**
- Maintain proprietary **capital market assumptions** and build asset allocation models that represent the global capital market opportunity set

A number of the largest and most respected financial services firms trust Prima to do the legwork, ask the right questions, and cover the right issues.

## CONSIDER HOW WE CAN HELP YOU GROW MORE PROFITABLY

*Access actionable research and advice to unlock resources.*

Rather than gathering information, a more efficient use of your valuable time can be spent interpreting what we provide to make investment decisions on behalf of your clients.

*Leverage Prima Capital to achieve scale and contain costs.*

As your advisory practice grows, investment research can be increasingly demanding and expensive. Analyst coverage on hundreds of products allows you to stay apprised of a wide array of investment options.

*Stand out from the crowd and convert more prospects to clients.*

Private-labeled proposals, product profile reports, and toolsets allow you to present information in an organized manner with breadth and depth. Additionally, as an independent outside investment counsel, Prima helps you gain a competitive edge by serving as an extension to what you bring to the table already.

## PRIMAGUIDE PLUS IS COMPRISED OF THREE MODULES

### PRIMAGUIDE®

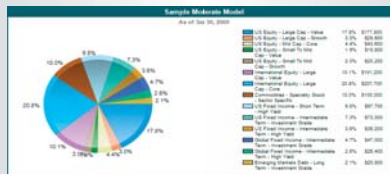
*Research Application and Due Diligence on Managed Accounts, Mutual Funds, and ETFs*



**PLUS**

### PRIMA ALLOCATIONGUIDE™

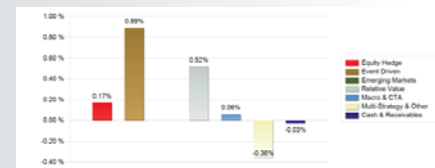
*Proposal Generation Application and Asset Allocation Advice*



**PLUS**

### CONSULTING

*Portfolio Design, Manager Selection, Investment Committee Presentations, Guidance & Industry Insight*



PRIMAGUIDE®	PRIMA ALLOCATIONGUIDE™	CONSULTING
<p><i>Powerful web-based research application that includes robust research analytics and detailed product profile reports</i></p> <ul style="list-style-type: none"> <li>• Prima “Select” List. High conviction analyst ideas across traditional and non-traditional strategies.</li> <li>• On-going monitoring with timely analyst commentary that includes updates and alerts delivered to your email</li> <li>• Toolsets: model construction, historical simulations, product comparisons, client educational presentations</li> <li>• Access to data and research on the entire mutual fund and ETF product universes</li> </ul>	<p><i>Proposal generation application that includes compelling output and asset allocation intelligence</i></p> <ul style="list-style-type: none"> <li>• Two sets of five risk-based asset allocation models. One set inclusive of an allocation to non-traditional strategies</li> <li>• Capital Market Assumptions covering 13 asset classes.</li> <li>• Proposals include: Investment Policy Statement, risk assessment questionnaire, proposed vs. target portfolio comparison report, and other integrated PrimaGuide output and toolsets</li> </ul>	<p><i>Portfolio Design, Manager Selection, Investment Committee Presentations, Guidance &amp; Industry Insight</i></p> <ul style="list-style-type: none"> <li>• Regular Consultation, Prima’s Consulting Services Group: Asset allocation, manager selection, and incorporating non-traditional strategies</li> <li>• Prima Analyst Interactions: Allows for discussion relating to asset classes, or specific managers</li> <li>• General Insight and Guidance: Including industry trends</li> </ul>

TECHNOLOGY BUILT BY ANALYSTS AND ADVISORS, FOR ANALYSTS AND ADVISORS

Prima Capital understands the business of advice and the demands of high net worth clients. We also appreciate that advisors have the desire to dig deep and scrutinize investments.

- Easily personalize all output (branding, disclosures, page selection)
- Demonstrate various investment concepts and illustrate capital market insights to clients with over 80 presentations from PrimaGuide’s Investor Education Kit
- Numerous user-specific controls: custom benchmark preferences, time period settings, export to Excel, store personal documents, save searches, track your favorite managers, and more.
- Extensive returns- and holdings-based analytics: style analysis, performance attribution, universe rankings

WHAT MAKES PRIMA CAPITAL DIFFERENT?

*Independent, Objective, Unbiased Due Diligence* – We don’t collect revenue in any way, shape, or form from the managers or funds that we cover. Our viewpoints are derived from deliberate research, and original thinking from experienced and credential investment analysts.

*Wealth Management Heritage* – For over a decade, Prima’s technology and advice have been put to work for advisory businesses, large and small, to ultimately benefit high net worth investors.



Sample Analyst Update

Insightful analyst opinions, updates, and alerts can be utilized to build and maintain client relationships.