

# PurePortal

Each of your unique clients share one common expectation: superior customer service.

## OVERVIEW

The world is moving to an on-demand, online model. Is your business prepared to keep up? With *PurePortal*, you can deliver exceptional customer service anytime, anywhere.

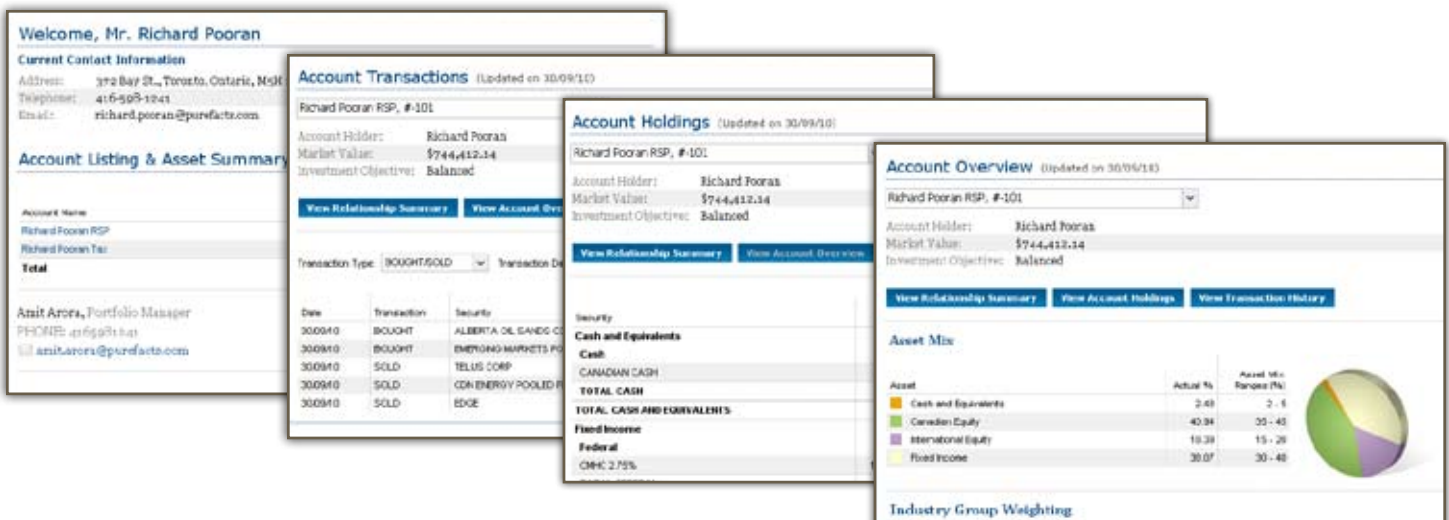
## A PRACTICAL SOLUTION

*PurePortal* is a proven platform that will allow you to quickly and confidently offer your clients anytime, anywhere access to their account information via a secure web portal. A *PurePortal* website will reflect your brand and deliver the high standard of service that your clients have come to expect. *PurePortal* allows you to combine documents (such as research reports or commentary) and client data into a rich and complete online experience that is personalized for each user.

*PurePortal* is simple and secure, and fully integrated with rest of the *PureFacts Wealth Management Suite*. The result is that all of the data presented to a client on your website will always be up-to-date and accurate.

## PUREPORTAL WEBSITES DELIVER:

- Account details
- Research and background information
- Commentary
- Notices and reminders
- Holdings, asset allocation, transactions and performance information
- Summaries and analyses
- Rich graphics, tables and charts
- The security that your clients demand
- The option to let clients submit requests, updates or questions



The image displays four overlapping screenshots of the PurePortal web interface for a client named Richard Pooan. The screenshots show:

- Welcome, Mr. Richard Pooan**: A dashboard with contact information (Address: 372 Bay St., Toronto, Ontario, M5H 1A1; Telephone: 416-598-1241; Email: richard.pooan@purefacts.com) and account listing.
- Account Transactions**: A table of transactions for Richard Pooan RSP, #101, updated on 30/09/10. The table includes columns for Date, Transaction, and Security.
- Account Holdings**: A summary of holdings for Richard Pooan RSP, #101, updated on 30/09/10, showing Market Value of \$744,412.14 and Investment Objective of Balanced.
- Account Overview**: A detailed overview for Richard Pooan RSP, #101, updated on 30/09/10, showing Market Value of \$744,412.14 and Investment Objective of Balanced. It includes an Asset Mix table and a pie chart.

Date	Transaction	Security
30/09/10	BOUGHT	ALBERTA OIL SANDS
30/09/10	BOUGHT	EMERSON MARKETS
30/09/10	SOLD	TELUS CORP
30/09/10	SOLD	CDN ENERGY POOLED
30/09/10	SOLD	EDGE

Asset	Actual %	Asset Mix Range (%)
Cash and Equivalents	2.43	2 - 6
Canadian Equity	40.34	35 - 45
International Equity	18.39	15 - 25
Fixed Income	30.07	30 - 40

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