

The Traject logo is positioned in the upper left quadrant. The background features a complex diagram of overlapping circles and lines, with three main components labeled: 'MARKETING CENTER' at the top, 'COMPLIANCE ENGINE' in the middle, and 'MULTIMEDIA PRESENTATIONS' at the bottom. Each component contains a small blue icon resembling a stylized 'W' or 'K'.

# Traject™

## The next-generation of product distribution

A web-based application designed to boost product sales, enhance compliance and lower costs for financial services companies

**WEALTH 2 K, INC.**





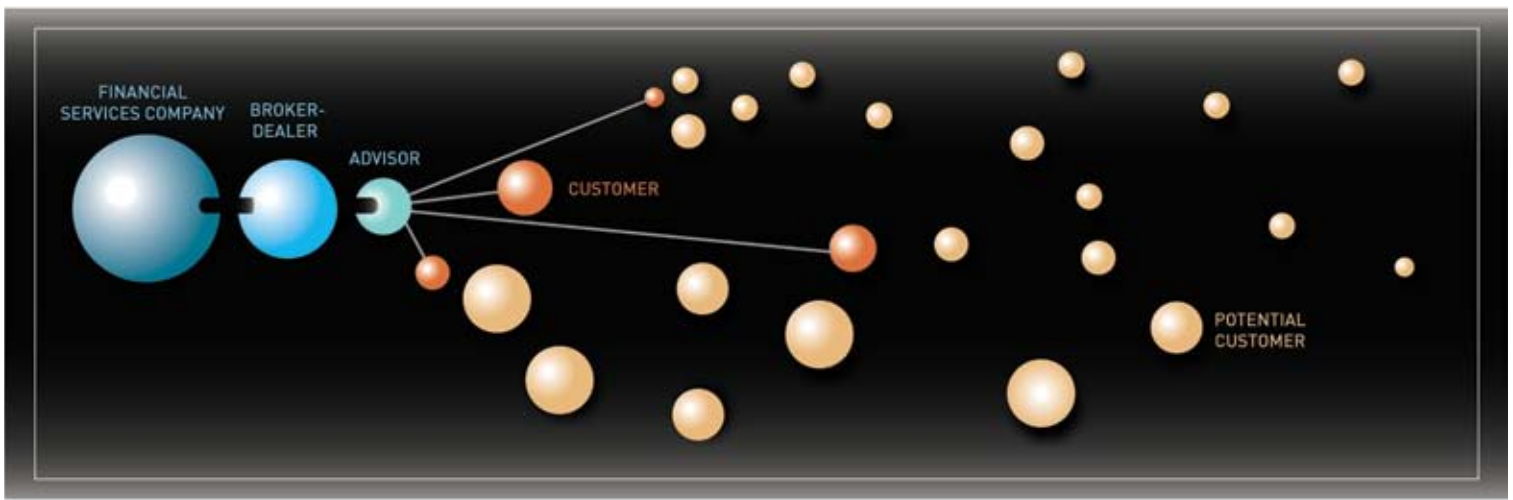
Insufficient  
**Inefficient**  
Commoditization

The existing physical distribution network

**Inconsistent**



**Insufficient** consumer education  
Intense regulation and compliance  
**Inconsistent** sales practices  
Escalating marketing and sales cost  
**Commoditization**  
**Inefficient** new product launches  
Advisors seeking quality marketing tools  
Modest up-selling and cross-selling



**Existing physical distribution channels are incapable of reaching all of the prospective customers who might purchase their products and services.**

**Today's financial products are distributed through a complex and expansive network of intermediaries.** Rigorous compliance and regulation, a crowded competitive landscape, complicated products and changing consumer behaviors threaten to limit sales potential.

Among large industries, the financial services industry has been the least effective at delivering engaging experiences to the web browser.

As a result, intermediaries are limited in the number of prospects they can reach. And because intermediaries' product competency is deep but limited to few products, cross-selling and up-selling opportunities are not realized.

Importantly, today's distribution channels are notable for inconsistency in the manner that complex products are explained to consumers.

This results in the potential for significant financial liability and endangerment of shareholder value.



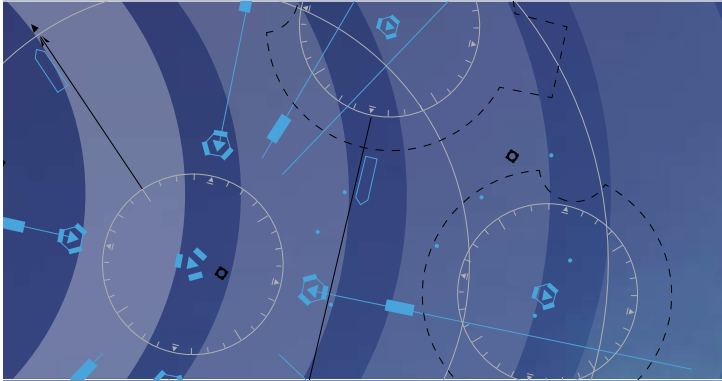
supercharges

Traject™


compliant

web-enabled

productive



Traject™ is a **web-enabled solution** designed to help meet business challenges facing insurance companies, broker-dealers, investment companies and banks. Traject™ **supercharges the ability of intermediaries** to be **more productive and more compliant.**





**Traject™ performs the heavy lifting of delivering balanced sales presentations on new or current products, assuring 100% compliant positioning, 100% of the time.**

**Traject™ expands the capacity of intermediaries to reach more potential customers in a compliant manner across multiple types of sales.**

To engage more prospects on more products without sacrificing the advisor's central role, the Traject™ network creates personalized microsites for each intermediary across channels of distribution. These microsites stream compelling educational content to an unlimited numbers of prospects.

Wealth2k believes that in the near future financial advisors will each have dozens of microsites. These microsites will serve as the electronic replacements for today's print brochures. The "electronic brochures" convey an impressive experience traditional brochures can't match. Although they are infinitely more persuasive, they require no printing, handling or shipping. Hence, they cost less. This is a classic example of being able to deliver more for less.

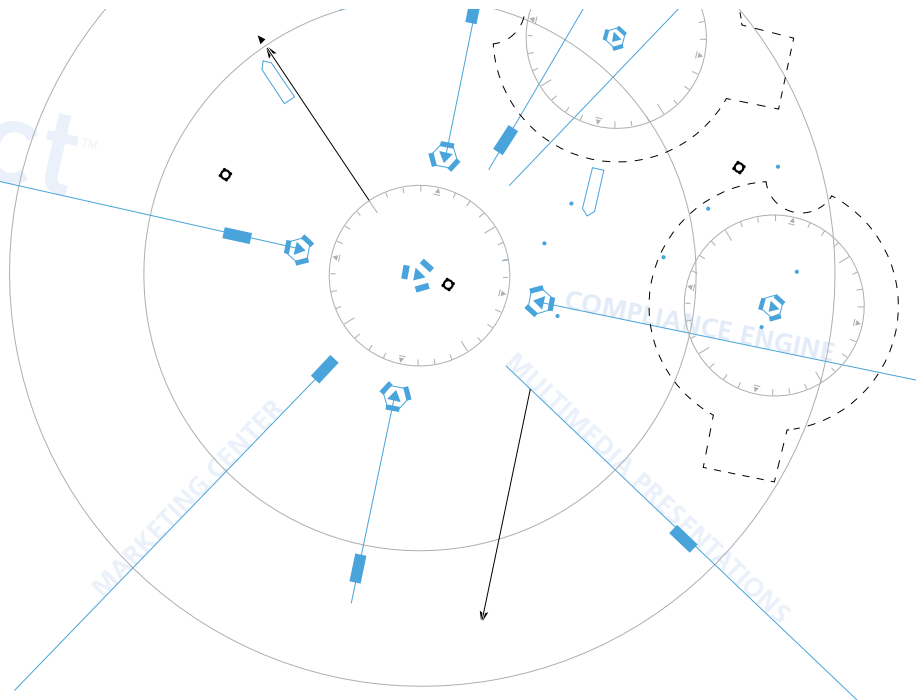
Traject™ can both accelerate adoption and sales success of new products while simultaneously lowering costs. Wouldn't your organization benefit by being able to equip each intermediary with the capacity to compliantly sell the new product from the very moment it is launched?

Traject™ has been designed to easily integrate with broker-dealer, bank or independent agent distribution channels. From easy-to-use web consoles, the network offers sophisticated, real-time management including the ability to manage advisors, multimedia and print content, broker-dealer or carrier disclosure language, illustrations, and vast networks of microsites.

Traject™ will make it easier for broker-dealer compliance executives to be comfortable with their registered reps working with your products and solutions. Every function and interaction that takes place on the Traject™ network is compliant by definition, and able to be monitored in real-time.

Traject™ is easy to implement, economical, and requires no attachment to your existing IT infrastructure. It's hosted and managed by Wealth2k, Inc.

# Traject™



**Traject™ addresses some of the most common business challenges financial services companies face in terms of distributing products.**

### **MARKETING CENTER**

Traject™ offers customizable, consumer-facing sales tools unique to the needs of individual insurance companies, investment companies, broker-dealers and banks.

### **REAL-TIME REPORTING**

Traject™ provides daily reporting on user activities including illustrations created by advisors. This reporting enhances both compliance and monitoring of advisor productivity.

### **ADVISOR PERSONALIZED MICROSITES**

Traject™ creates one or more personalized, consumer-facing microsites for advisors to use in promoting a variety of products or services. These microsites showcase products in compelling sales and educational presentations proven to be highly effective in stimulating new and diverse sales.

### **MULTIMEDIA PRESENTATIONS**

Traject™ provides informative, engaging and compliant presentations that reduce printing and distribution costs and increase advisors' productivity, effectiveness, cross-selling and up-selling. Consumers can conveniently educate themselves on your products without sales pressure and without having to procure, print and read brochures.

### **ILLUSTRATION ENGINE**

Traject™ offers a flexible illustration systems including strategies for income distribution. The engine can be customized to meet the specific needs of any financial services company.

### **COMPLIANCE ENGINE**

Traject™ is capable of handling complex compliance requirements. Content management is available at the end-user and organization levels. The system is capable of dynamically generating required disclosure language into the multimedia presentations as well as all other consumer-facing marketing deliverables.

### **EXTERNAL SYSTEM INTEGRATION**

Traject™ can receive secure posts from third-party systems. Organizations, which have invested in existing proprietary websites, may allow their users to seamlessly login to Traject™ consistent with enterprise branding. When desired, integration can be customized to allow for user data synchronization between systems.

### **WORKFLOW ENGINE**

Wealth2k can create a custom workflow process unique to each customer. This allows our customers to have the peace of mind that content is properly written and managed by a compliance officer in real-time.

### **ROLE-BASED BRANDING**

On a user role basis, Traject™ has the ability to look and behave in concert with your regional or divisional requirements. The look, feel and functionality can be customized per your company's specific needs.

### **ACCOUNT MANAGEMENT**

Traject customers have access to real-time user management of their agents. They can view user accounts, review compliance disclosures, modify user information and enable/disable user accounts.

About

# WEALTH2K, INC.

**Wealth2k built Traject™  
to help you strengthen your  
intermediaries' ability to sell  
more and sell more compliantly.**

**Wealth2k's mission is** to leverage our technology and media creation talents to add value to your organization in the critical area of strategic marketing. We are able to provide the ultimate showcase for your products, and design sales strategies, which expand your audience of potential customers.

We gauge our success by helping our clients reach pre-defined business goals that are attained after the introduction of our tools and services. These goals may include increasing top-line sales, advisor recruiting or asset retention, as well as successful entry into new markets. All of our tools and strategies seek to bring about improvements in compliance and sales practices.

**Visit [www.Wealth2k.com](http://www.Wealth2k.com) to learn more** about how our innovative technology, multimedia content and strategic consulting services can help your organization meet its goals.

**800.200.9404**

Traject™

ADVISOR PERSONALIZED MICROSITES

MARKETING CENTER

ILLUSTRATION ENGINE

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