

## Wealth2k, Inc. Announces Introduction of Traject™ Network

Web-based technology allows financial services companies to increase quality sales and reduce costs while strengthening existing distribution channels

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Wealth2k, Inc. today announced the introduction of Traject™, its web-based network designed to help financial services companies boost sales of new and existing products, improve compliance and reduce marketing costs.

Traject™ enables insurance companies, investment companies, banks and broker-dealers to superimpose a virtual distribution channel on top of a traditional intermediary channel resulting in productivity gains for the traditional channel. Traject™ opens up new sales opportunities by exponentially increasing the numbers of prospects that can be reached with high quality, compliant sales and educational presentations streamed over the Internet.

"Traject makes it possible for financial services companies to strengthen their intermediaries' ability to reach more prospects with engaging and compliant sales messages," said David Macchia, President & CEO of Wealth2k, Inc. "While much has been done in terms of using web-based technology to connect advisors with back-office systems, the consumer-facing online experiences are sub-par and contrast poorly with other large industries. With the best prospects already online including 72% of 51-59 year-olds and 54% of 61-69 year-olds\*, the industry can't afford to neglect online customers who control so much wealth."

At a time when consumers have embraced multimedia, when YouTube.com is streaming one-hundred-million videos each day, when virtually every home has a DVD player, and when broadband is no longer the exception but rather the rule, it's imperative that financial companies deliver browser experiences which are in keeping with customers' expectations. "Unless the current gap is bridged," continued Macchia, "even big players in financial services run the risk of seeing their businesses decline."

### Traject™ Helps Companies Meet a Critical Communications Challenge in their Retirement Income Businesses

"Companies building retirement income businesses face a special challenge in terms of communication strategies". Said Macchia, "A large percentage of financial advisors are themselves Boomers, and many will be retiring at the same time that tens of millions will be needing competent income distribution guidance. There is no practical alternative for intermediaries to reach all of the prospects requiring guidance in the distribution phase except through the use of a web-based solution. In the future, therefore, I expect to see advisors routinely using the web to interact with these prospects. However, the browser experiences delivered will be rich, engaging, educational, motivational and compliant. Traject supplies the compliant framework to support the necessary improvement in the browser experience."

## Improving New Product Launches

Once installed, Traject™ transforms the process of launching products by instantly conveying to every intermediary the ability to deliver high-impact, compliant sales presentations on the new product. "In financial services, we've yet to experience what it would be like to have all members of a distribution channel able to effectively sell a brand new product from the first day it's introduced. To the extent that we can speed-up the time it takes to get new product sales to critical mass, we can help financial companies realize a significant cost savings," said Macchia.

### Traject™ Delivers:

- 100% compliant and consistent product positioning, 100% of the time, regardless of advisor skill level or product complexity.
- Ability for advisors to compliantly educate consumers on single products, multiple product solutions and income distribution strategies
- Ability for carriers and broker-dealers to extend their existing investments in multimedia and other electronic content
- Reduced sales cycles, decreased marketing expenses and reduced anxieties over market conduct liability
- ASP model implementation cycles of as low as 30 days

### Key Features:

- Rapid implementation without the need to engage existing IT infrastructure
- Support for expansive networks of individual, personalized microsites and unlimited numbers of consumer presentations
- Modular architecture including compliance engine, illustration engine and marketing materials library
- Real-time management of agents and registered representatives' consumer-facing marketing activities
- Dynamically-generated broker-dealer disclosure language for multimedia, print, illustration and website content at the individual rep level

To view a multimedia presentation on Traject™ hosted by Wealth2k CEO David Macchia, visit [www.wealth2k.com/traject](http://www.wealth2k.com/traject). A whitepaper and brochure may also be downloaded at the website.

\*Source: Pew Internet & American Life Project

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