



XTRAC
SOLUTIONSSM



GET WORK FLOWING.

Imagine your business running on all cylinders. Where work flows efficiently, intuitively and seamlessly, from person to person, department to department, office to office.

Where location doesn't matter and information is instant. Everyone is connected, has exactly what they need at their fingertips and can easily collaborate on work across the office or around the globe.

Where everything you do is in complete control, in compliance and locked-down secure. Where you measure performance in real time, head off problems early and seize new opportunities.

Imagine the way your business gets work done as an advantage, not as an obstacle holding you back. With XTRAC® powering your business processes, it's all possible.



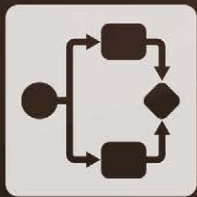
DISCOVER A SMARTER, FASTER AND MORE SECURE WAY OF WORKING.

XTRAC® is a workflow and document management application that automates, tracks and controls the way complex work gets done.

It streamlines your operations by connecting systems and departments – eliminating silos and providing transparency with instant tracking and reporting. With XTRAC, business processes are standardized, data and knowledge are accessible, and regulatory compliance is maintained so that your company can focus resources on more meaningful interactions. Work gets done more effectively than ever before.

XTRAC is fast and easy to deploy. You can simply adopt our proven processes as your own, or we can work with you to assess, design and implement a solution customized to your needs.

XTRAC Workflow Suite



Workflow Automation

Streamline and standardize your processes.
Ensure that the right information gets to the right person
at the right time and is handled the right way.



Hosted Document Management

Manage and store all documents and work histories in our highly secure
cloud. Easily share them via a secure client portal. Facilitate
compliance and ensure the highest levels of data protection.



Insights & Analytics

Gain visibility and control over business operations.
Spot problems quickly and identify opportunities for improvement.
Make better, faster decisions.

Proven Processes. Simply Delivered.

- New client onboarding and account setup
- Financial management and reporting
- Compliance testing and audits
- Operations and money movement
- Marketing collateral development
- Account maintenance
- Loan origination
- And more...



BUILT AND USED BY FIDELITY. AVAILABLE TO YOU.

Fidelity Investments, a global financial services leader serving more than 20 million individuals and institutions with more than \$4.4 trillion in assets under administration,* has relied on XTRAC to help run its operations for more than 20 years.

XTRAC is the high-performance engine that drives many of Fidelity's daily operations, including key business processes such as customer account activity, human resource management and financial reporting.

It integrates with dozens of proprietary and third-party applications that range from engagement systems such as customer relationship management and inbound operations to recordkeeping systems such as asset management and human resources.

XTRAC helps power how Fidelity works.

And it's available to help power your business, too.

X Cross-business
T Tracking
R Routing
A And
C Control

*"XTRAC has helped us grow by being a consistent, scalable operating infrastructure. They also have a **passion for ongoing innovation**. So, with XTRAC **keeping ahead of the latest technology** and security practices, we've been able to continuously improve service to our clients."*

Fidelity Business Unit President

* Source: www.fidelity.com as of 10/31/2013



SAY GOOD-BYE TO BACKLOGS, BOTTLENECKS AND BLACK HOLES.

XTRAC seamlessly connects your front office to your back office. Associates have real-time access to work status, documentation and transaction history at their fingertips. They are empowered to address client inquiries without having to contact another department and can even initiate their own requests.

The XTRAC secure web portal allows associates to share documents and collaborate with clients anytime, anywhere, which improves responsiveness and speeds transaction time.

And XTRAC provides visibility into work across your entire operation, enabling you to monitor performance in real time, manage against KPIs (key performance indicators), and identify and resolve issues quickly.

- **Activity Tracking** provides a summary of the work items at each stage in your process.
- **Risk Management** identifies work items requiring attention based on your specific thresholds.
- **Volume Indicators** allow managers to better monitor workloads and prioritize work – in real time.

With XTRAC, individuals at all levels of your organization have the information they need to make more informed decisions and take action faster. It all adds up to faster execution, fewer errors, lower costs and improved responsiveness.

Which leads to happier clients.





KEEP WORK MOVING.

XTRAC can deliver dramatic benefits to your entire organization. Teams work faster, smarter and more effectively. Work is streamlined, synchronized and transparent. Compliance is maintained every step of the way.

As you become more data-driven, an organizational intelligence emerges. You shift from responding to problems to anticipating and preventing them. Errors, costs and risk are greatly reduced. Client experience improves.

Ultimately, XTRAC provides the freedom to embrace change and grow in an increasingly demanding and complex environment. You'll discover capacity you never imagined and the ability to handle surges in new business flawlessly and without having to add more costly resources.

So why wait? Contact us today and get work moving.



**With XTRAC
your firm can...**

Quickly respond to change...

Welcome auditors with confidence...

Reduce costs, increase productivity...

Ensure everyone is on the same page...

Focus on what matters most...

Have happier associates...

And even happier clients.

Proven Processes. Simply Delivered.

For more information, contact:
sales@xtracsolutions.com

855-WRK-FLOW | www.xtracsolutions.com

XTRAC Solutions

Proven Processes. Simply Delivered.

About XTRAC Solutions

XTRAC Solutions, an independently operated Fidelity Investments company, provides workflow automation and document management. With its solutions used extensively across Fidelity and by many other companies, XTRAC has over 20 years of industry experience managing complex, mission-critical processes that support thousands of users and millions of work items annually. XTRAC delivers excellence in business results and customer satisfaction for all its global clients.

For information, contact: sales@xtracsolutions.com

855-WRK-FLOW | www.xtracsolutions.com

XTRAC and the XTRAC Solutions logo are service marks of XTRAC LLC. All Rights Reserved. Fidelity Capital Markets and National Financial are divisions of National Financial Services LLC. Fidelity Family Office Services and Fidelity Institutional Wealth Services are divisions of Fidelity Brokerage Services LLC. Both Members NYSE, SIPC. Products and services provided through Fidelity Financial Advisor Solutions (FFAS) by Fidelity Investments Institutional Services Company, Inc.

675701.1.0

245 Summer Street, Mail Zone V3B, Boston, MA 02210

December 2013