

Now there's an easier, faster way to deliver exceptional service to clients investing in Federated funds—without tacking on extra costs. Federated's EDGEnet<sup>®</sup> puts a suite of powerful, yet easy-to-use investment management tools at your fingertips. This free, online trading and account management system provides a transaction platform that allows financial institutions and financial intermediaries to trade, confirm transactions and retrieve account information and details about Federated mutual funds.

**EDGEnet's user-friendly interface allows you to:**

- ▶ Set up, monitor and reconcile accounts
- ▶ Execute account trading activities involving Federated money market and fluctuating mutual funds
- ▶ Generate a wide range of reports that can be downloaded to a report bin or delivered by email
- ▶ Personalize your session using customizable screens

**Manage your clients' accounts—and their expectations—more effectively**

EDGEnet simplifies client account management by providing an intuitive, practical interface that allows you to:

- ▶ Establish new accounts in seconds
- ▶ View current account balances, income information, daily histories and open trade statuses
- ▶ Maintain and balance accounts and update account information in a single session

**Monitor every aspect of your investments**

- ▶ Get detailed fund performance information and prospectuses

**Trade the way you want**

EDGEnet gives you total control over all of your trading activities involving Federated mutual funds. Use EDGEnet to simplify your trading:

- ▶ Choose a trading style that meets your needs: rapid entry or single entry, or import a trade file
- ▶ Review and validate trading details before posting
- ▶ View details on batch trades down to the transaction level
- ▶ Get immediate confirmations of posted trades
- ▶ Generate and print trade journal and settlement instructions
- ▶ View settlement and reconciliation information online
- ▶ Determine the status of open (unposted) trades across your client groups
- ▶ Settle same day (T) for money market fund transactions; settle on a next-day basis (T+1) for fluctuating funds

**And when you use EDGEnet to trade Federated mutual funds, you won't have to pay a transaction fee.**

## Powerful reporting options put the information you need in one place

Unlike other clearing systems, which make generating account- and client-level reports a difficult and time-consuming process, EDGEnet brings the information you need together, in one place, automatically. You will have access to many reports such as:

- ▶ Estimated trial balance
- ▶ Account history
- ▶ Daily fund performance
- ▶ Dividend distribution

## Fast, flexible report generation and distribution

EDGEnet makes it easy for you or anyone on your team to generate and distribute critical account and client data information.

- ▶ Schedule your reports to generate automatically at a time you specify
- ▶ Download the reports online, have them delivered by email or to a secure report bin
- ▶ Choose a data format that meets your needs—Microsoft Excel®, Microsoft Word®, HTML, PDF or Export format

## Advanced technology and support from a name you trust

When you choose EDGEnet, you can feel confident placing your trust in the resources and reputation of Federated Investors, Inc., a leading money manager for over half a century. Federated delivers a diversified product line to financial intermediaries that helps them reach a variety of investment goals for their clients.

As an EDGEnet user, you'll have access to Federated's team of experienced Systems Client Consultants, who can guide you through the application and answer any questions you may have.

## Getting started

Because EDGEnet is an online application, there's never a need to download or install software.

- ▶ Fill out a Logon Application online at <https://edgenet.federatedinvestors.com>
- ▶ Once you've completed the form, you can fax it to 412-992-3022
- ▶ Call us at 1-800-432-6106, and a Systems Client Consultant will answer any questions you may have

After we receive and approve your form, a Federated Systems Client Consultant will establish a unique, personalized EDGEnet username, and contact you when it is ready. A Systems Client Consultant will provide step-by-step instructions for accessing and using EDGEnet and also direct you to a comprehensive online EDGEnet tutorial.



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