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Optional Research Services

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Research Options	Monthly Cost
***Advisor's Package (Pro package)* —Save $30 per month**—Includes Reuters® News and Commentary; BNY Jaywalk Consensus Complete; Intraday and Historical Charts; 500 Real-Time (non-AMEX) Quotes per month ($0.03 per real-time quote thereafter. Add AMEX Real-time quotes for $30, see below.)	**$45**
***Mutual Funds Package* —Save $15 per month—**Morningstar Fund Analytics; plus The Rankings Service	**$45**
Analysis Package*— Save $20 per month—**MarketEdge; S&P's 5-page Reports; Thompson Reports ***(See all S&P product on page 3 of this document)	**$45**
Argus Research • Level 1, includes Analyst Report, Market Watch, Weekly Staff Report and Vickers Insider Report. • Level 2 adds Model Portfolios Report, Insider Watch List, Daily Call Pack, and Weekly "Best Of" Report.	**Level 1 $25** **Level 2 $45**
BNY Jaywalk® Consensus—The Bank of New York's independent equity research consultancy, a global network of over 150 Independent Research Providers (IRPs), free from investment banking conflicts. NETX360 offers BNY Jaywalk Consensus recommendations, which are the average of all current recommendations by IRPs. The service includes: Current Jaywalk Consensus, Number of IRPs, Consensus 90 days ago, and the overall breakout of Very Positive, Positive, Neutral, Negative, Very Negative ratings. Available on a universe of over 4,900 equities. The "Complete" service gives you all of the above items plus it includes links to 1-page PDF representations of Consensus Metrics.	**Metrics only $15** **Complete $20**
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Dow Jones News Service including Dow Jones Plus with NETX360 integration. Requires the above contract with Dow Jones plus an additional $20	**$20**
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Research Options	Monthly Cost
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Morningstar Advisor Workstation Enterprise Edition—Diagnose and resolve diversification issues; search and present security research; create hypothetical illustrations; and develop financial plans. This premier offering gives you research, portfolio tools, and planning functionalities for a wide range of security types including open-end funds, closed-end funds, exchange-traded funds, stocks, variable annuity/life products and 529 plans. You can purchase Morningstar Advisor Workstation Enterprise Edition directly from Morningstar. There is an annual outlay of $2,295 paid to Morningstar (it can be billed monthly as well). The cost without the SSG discount starts at $2,975. *(Please confirm this amount with Morningstar directly, by calling 800-957-6023, you also order the product at this number*) You can also learn more at http://advisor.morningstar.com/goto/ssg	[redacted]
For the above, **Morningstar Advisor Workstation Enterprise Edition,** You can integrate your data from **NETX360.** This gets you the positions not the transactional data.	**$21 per month**
Morningstar Equity Research provides independent Morningstar perspective and brand-name recognition with analysis and ratings of 1,800 stocks. This offering also provides access to Morningstar's flagship Tortoise and Hare stock portfolios, Strategist columns and daily videos. The data pages include up to 10 years of financial history on more than 9,800 stocks.	**$20 per month**
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Quotes: Unlimited real-time quotes — This package includes unlimited access to real-time quotes from NYSE, NASDAQ, AMEX and OPRA.	**$50**

Research Options	Monthly Cost
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Analysis Package*— Save $20 per month—**MarketEdge; S&P's 5-page Reports; Thompson Reports ***(Same package that was presented on the 1st page of this document)	**$45**
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Research Options	Monthly Cost	Advisor Initials
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Mutual Funds Package —Save $15 per month—Morningstar Fund Analytics; plus The Rankings Service	$45	
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Research Options	Monthly Cost	Advisor Initials	Research Options	Monthly Cost	Advisor Initials
Argus Research, Level 1	$25		NaviPlan Extended with Ibbotson Asset Allocation	$113	
Argus Research, Level 2	$45		NaviPlan Extended with Lockwood Asset Allocation	$102	
BNY Jaywalk Consensus—Metrics only	$15		NetExchangePro® Mobile Free for 2011	FREE	
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Credit Suisse CSFB Research	$80		Quotes: Streaming Real-time Quotes (Includes NASDAQ, NYSE & AMEX fees)	$70	
Dow Jones® AdvisorPro, Financial Advisor Service	$35		Quotes: NASDAQ Level II Quotes- Users must have either Streaming or Unlimited Real-time Quotes	$55	
Dow Jones News Service including Dow Jones NewsPlus	$110		Time & Sales (Requires unlimited real-time quotes)	$30	
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