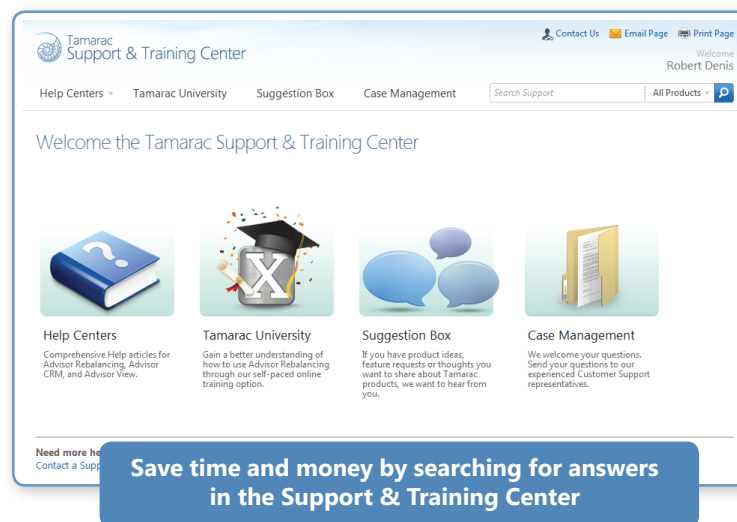


## Training & Support

### Best-in-Class Customer Support

Tamarac customer support is the best in the business. Highly trained and courteous, our customer service professionals won't be satisfied until your problem is solved or your question is answered. All of our customer support professionals have strong backgrounds in finance and have extensive training on all Tamarac products. Our dedication to customers and our commitment to customer service have earned us a continued 97 percent client satisfaction rating.

You can get answers to your questions by phone, e-mail, or online at our Support & Training Center. The Tamarac Support & Training Center combines our extensive Help Centers for each product and lessons from Tamarac University in an easy-to-use interface. Find answers to commonly asked questions, watch videos from our comprehensive library of training videos, search our online knowledge base, and more.



### Proven Implementation Process

Replacing manual processes with software automation represents a significant process change for any firm, and it offers opportunities for greater portfolio management efficiency that simply aren't possible with manual processes.

As a client of Tamarac, you will embark on a proven and streamlined implementation process with the support of a highly experienced team that works with you every step of the way. Our implementation team takes the time to fully understand your portfolio management process, guides you through the change management process, and offers best practices along the way.



## Tamarac University

When it comes to software training, no other technology company approaches the level of training and educational resources that Tamarac offers. We don't believe it's enough for our customers to simply know how to use our software. We want our customers to get the most out of the powerful features that Advisor Xi offers. Whether it's increasing productivity, creating automated workflows, or designing a complex model, we want the process to be effortless.

That's why Tamarac offers the industry's most extensive training resources. Whether you're a new customer or have hired new employees that require training, Tamarac has the resources you need in the formats you prefer.

## Annual User Conference

Tamarac hosts an annual user conference, which offers a wide selection of tracks and sessions that support your unique learning objectives. Attendees benefit from interacting with a large contingent of Tamarac's brain trust and hundreds of advisors that have similar investment styles and system configurations.

"While the technology is excellent, what's really important to me is the people. Everyone I have worked with at Tamarac is extremely knowledgeable, good at what they do, easy to work with, and they make my life easier."

**Jim McGehee, Founder - McGehee Wealth Advisory Group**



Tamarac User Conference 2011