

WealthTec® Suite Requirements

Subject Matter Expertise

WealthTec Suite is designed for the experienced professional with considerable subject matter expertise in a variety of financial, tax and estate planning areas. Each component of the suite focuses on one or more aspects of wealth management for the mass affluent, high-net worth and ultrahigh-net worth individuals. If you have any questions about how **WealthTec Suite** can assist you in your wealth advisory practice, please do not hesitate to contact **WealthTec**.

System Requirements

Before attempting to install and operate this software, please review the following minimum system requirements to ensure that your hardware and software configurations are compatible with **WealthTec Suite** and robust enough to provide satisfactory performance:

- Installation on the local hard drive
- 32-bit or 64-bit Windows® XP or later operating systems
- 32-bit Microsoft® Office® 2003 or later
- 2GB RAM (4GB or more for the comprehensive modules) and a fast processor

Unique Requirements for Microsoft Vista, Windows 7 and 64-Bit Windows XP

In order to install and operate WealthTec Suite with the latest versions of Microsoft Windows®, you must have administrator rights if you install the program in the default directory (i.e., C:\Program Files\WealthTec\WealthTec Suite <NV> or C:\Program Files (x86)\WealthTec\WealthTec Suite <NV>).

To run the suite in these environments right-click the program icon (on your Desktop or via the Start\Programs\WealthTec menu) and select Run as Administrator. This will enable you to properly launch and operate the software without generating errors that are specific to these operating systems.

NOTE: You can set **WealthTec Suite** to always run as administrator by following these steps:

- Right-click the program icon and click *Properties*.
- On the *Properties* sheet, click the *Compatibility* tab.
- Under *Privilege Level*, select the *Run this program as an administrator* check box, and then click OK.

IMPORTANT: If your organization will not grant you administrator rights, you have two alternatives for installing the program in Windows 7:

- Install it in the C:\WealthTec directory
- Install it in Windows XP Mode

NOTE: Windows XP Mode requires Windows Virtual PC, as well as Windows XP Mode. Please see www.microsoft.com for details.

If you have any questions or problems regarding these requirements, please consult your IT department.