

ASSETTE Portal

An easy way to keep clients and consultants continuously informed about the value of active management with your own, firm-branded, secure client portal



• Your clients are connected and they expect to be connected to you. Always stay in touch and provide daily portfolio information and frequent updates

• Provide timely insights and perspectives on market conditions and economic events, and their impact on clients' portfolios

• Reduce manual effort associated with report delivery while enhancing your corporate brand and professionalism

• Includes pre-built interfaces to accurately combine data from APX®, Axys®, Advent OnDemand®, Schwab PortfolioCenter®, FactSet®, BondEdge®, and Excel®

Provide exceptional client service and show the value you add

During those inevitable times when performance suffers, it is exceptional client service that buys you time to turnaround performance. Allowing clients to self-answer routine questions and automating manual information delivery frees you up for proactive client service - time you can use to check-in with clients and discuss ideas that illustrate the value you provide.

Keeping clients and consultants consistently updated also keeps you on top of their mind when they are looking to add more assets to outside managers.

Save time, money and paper while delivering information faster

No longer is it sufficient to rely on regular mail to deliver quarterly reports and other client communications. Your clients expect electronic delivery and timely correspondence. Manual delivery is not only costly and unnecessary, but also a waste of paper. Stuffing envelopes take away time from serving clients.

With Assette, you increase convenience to clients while boosting internal efficiency. Combine your client portal with [Assette Reports](#) for a seamless system to both produce and deliver client reports to clients and consultants.

Enhance your professionalism—providing a secure client portal is easy

Clients and consultants today, are comfortable interacting online with custodians and other financial institutions and they increasingly expect online access to portfolios from your firm. They want to know the impact of market events as they unfold and the insights behind your investment decisions.

Assette Portal lets you communicate timely information and rich insights through your own client portal. Your portal is branded to reflect your corporate image. Assette makes you look good while increasing client satisfaction.

Seamless integration with your existing systems and data checks

Interfaces built from the ground up for APX®, Axys®, Advent OnDemand®, Schwab PortfolioCenter®, FactSet®, BondEdge®, and Excel® let you effortlessly send all of your data to your client portal. You don't need help from IT professionals.

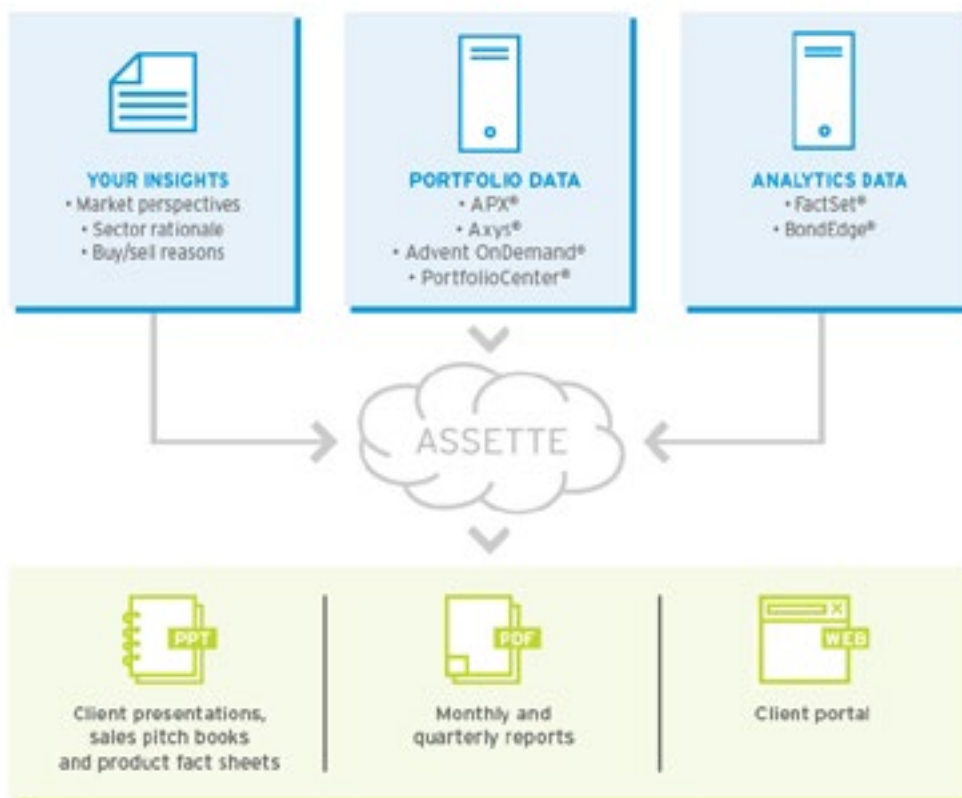
All interfaces are pre-built. Easily download them from the web, and you are ready to send data in minutes. Send data daily, automatically.

Each time you send data, Assette runs over 250 [checks](#) on your data to ensure that only accurate information appears in your important client communications.

Assette Portal is a cloud-based application that is hosted in Assette's secure data center. The software is installed and maintained with no IT effort. Everything you need, including interfaces to your internal systems, is pre-built and ready to go.

When your clients go to your portal, there is no Assette branding - it is your own branding. All communication between your client's web browser and Assette servers is secure.

Assette lets you create client communications filled with insight and investment stories, going beyond the standard reports with just charts and graphs.



Assette

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