

ASSETTE Presentations™

A simpler and faster way to communicate the value of active management through client presentations, sales pitch books and product fact sheets



• No more rekeying data, no more errors – automatically integrate data from accounting and analytics systems to generate presentations and shave 85% off manual work

• Easily communicate the insights driving your investment decisions with sector overviews, active share analysis and other data

• Publish and store updated firm information, team bios, investment process descriptions and other information to a single place and have all presentations reflect the latest information

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

Spend less time preparing presentations and fill your client communications with insights and investment stories

Easily combine rich information, ranging from firm updates to investment insights, combined with data from your standard accounting and analytics systems, to quickly create presentations that clearly tell the story behind your results.

There is no more hand-keying of data or transferring Excel® charts to PowerPoint®. No more multiple rounds of error corrections. With Assette, you update content, click to integrate data and generate beautiful, accurate presentations.

Enhance your brand because it's easy to create attractive presentations

Start by simply placing charts, tables, and your insights on slides to create templates, a one-time effort. Then, Assette automatically populates templates with data from your internal systems and inserts the latest versions of your insights and stories.

Investment stories and strategy-specific insights are automatically integrated to create compelling client presentations.

Get started quickly—Pick from a content library designed for institutional firms

Select from over 150 professionally designed charts and tables, covering everything from rolling returns to performance attribution. Settings in the charts and tables enable customization, so you can meet exact client and sales information needs.

Visit our [Gallery](#) to view the breadth of content that is included in Assette.

Seamless integration with your existing systems and data checks

Interfaces built from the ground up for APX®, Axyx®, Advent OnDemand®, Schwab PortfolioCenter®, FactSet®, BondEdge®, and Excel® let you effortlessly combine all the data you need for client presentations, sales pitch books and product fact sheets. You don't need help from IT professionals.

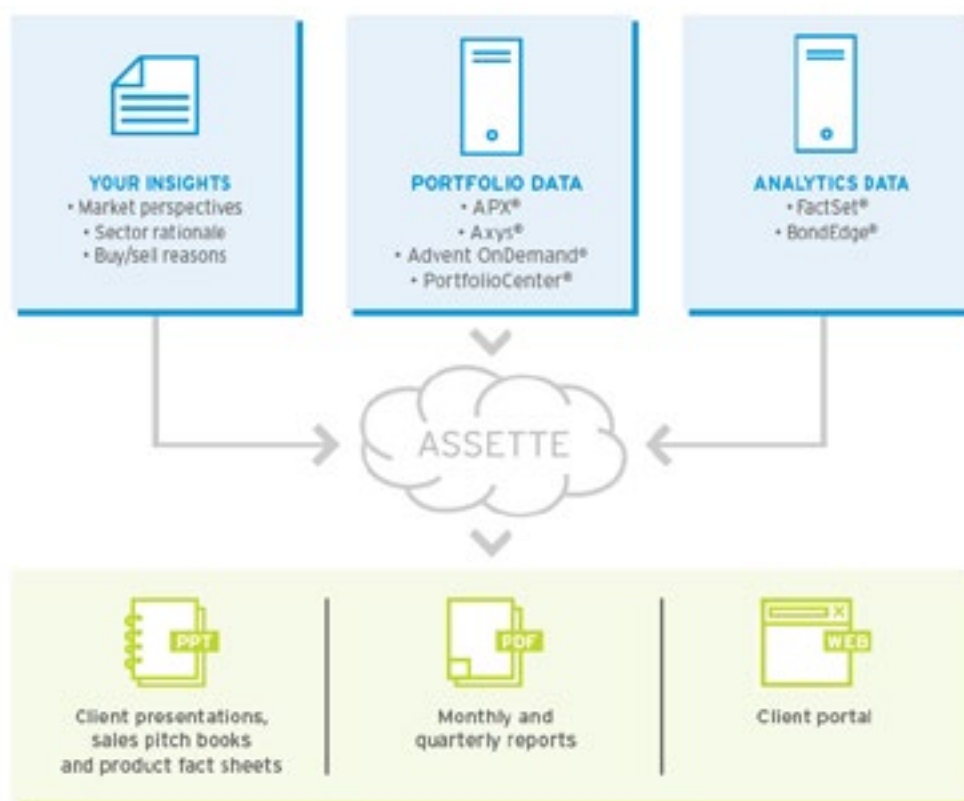
All interfaces are pre-built. Easily download them from the web, and you are ready to send data in minutes.

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 Presentations 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.

To install the application, you go to a website and click on a link - the application is installed in a few minutes. After that, you start the application just like any other software. At start-up, Assette automatically checks for updates and installs the latest version so you always have the newest software at your computer. Assette Presentations can be installed on any Microsoft Windows® computer with Internet access - making it easy for you to generate presentations whether you are in the office, on the road or at home.

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



Assette

1 Faneuil Hall
4th Floor
Boston, MA 02109 USA
Tel 877 723 6161

sales@assette.com
www.assette.com