

ASSETTE Easy Editions

The easiest way for small wealth management firms to create client presentations, quarterly reports and offer a firm-branded, secure client portal



• Free up time to serve clients by slashing 85% off manual work and resulting errors

• Publish quarterly commentary, firm updates, bios and other information to one place and have all client communications reflect the latest information

• Enhance your corporate brand and professionalism while providing 24X7 access to individual account information that is highly customized and secure

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

ASSETTE EasyPresentations

With EasyPresentations, creating highly customized client presentations is hassle-free. Use Microsoft PowerPoint® to define templates by simply placing charts, tables, or other exhibits on slides. Visit the [Gallery](#) to view the institutional-quality report outlines we offer.

For static content like firm overview, bios, market insight, etc. simply indicate template placement. Setting up templates is a one-time effort. Assette automatically populates presentations with data you send from internal systems and inserts the latest insights and perspectives, adding value to your data.

ASSETTE EasyReports

If your client reports don't look attractive—with plain tables, too few charts, and inconsistent fonts and colors—you're undercutting the image you work so hard to communicate. Select from 50-plus professionally designed charts and tables, covering everything from asset allocation to relationship reporting. Visit the [Gallery](#) to view all the charts and tables.

Enrich your reports by providing more than just the minimum—easily add top holdings and commentary. Reporting at the relationship level and individual account level in the same reporting packet is simple.

ASSETTE EasyPortal

Clients today expect anytime-anywhere access to information. Mailing reports is not sufficient. Sending clients to custodial sites? You're undercutting the relationship you work so hard to foster.

Our software 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 Axys®, Advent OnDemand® and Schwab PortfolioCenter® let you effortlessly send all of your data to Assette - you send data once and the latest information is available to generate presentations, client reports and display on your client portal. You don't need help from IT professionals.

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

Each time you send data, Assette runs over 250 [checks](#) to ensure that your clients see only accurate information.

Assette's Easy Editions, simplified versions of Assette's standard applications, is cloud-based software 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 applications, you go to a website and click on a link - the applications install 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 can be installed on any Microsoft Windows® computer with Internet access.

When it comes to the Assette EasyPortal, there is no Assette branding - it is your own branding. Your portal is securely accessible anytime from anywhere using all major web browsers.

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