

TAMARAC REPORTING

Top 6 reasons to move from PortfolioCenter to Tamarac Reporting

When you partner with Tamarac for your back-office operations, you can experience significant time and resource savings. That means more focus can be applied to revenue-generating activities, such as building client relationships and bringing on more assets. With aggregated performance reporting features, our technology allows you to see a holistic view of your clients' accounts and so much more.

Here are 6 reasons why successful advisors choose Tamarac Reporting:

- 1. No Data Conversion.** Tamarac Reporting is a web-based overlay that can restore your PortfolioCenter backup without a time consuming or expensive conversion.
- 2. Back-office Support.** Our Service Team handles your daily downloads, posting and reconciliation of data as well as daily integrity audits.
- 3. Performance & Indices.** You'll never have to run intervals—ever again! Our platform calculates daily return data so you can run any point-to-point performance date range. Also, we provide daily data for over 400 indices for comparisons or offer you the flexibility to create your own blended benchmarks.
- 4. Comprehensive Reporting.** Tamarac Reporting gives you the ability to customize reports to meet the needs of your clients, along with a dynamic dashboard that provides client data at your fingertips. In addition, we offer advanced reporting capabilities for alternative investments and account aggregation.
- 5. Enhanced Client Experience.** A white-labeled client portal, secure two-way document vault and a mobile app allow you to drive the client experience narrative and deepen relationships.
- 6. Business Continuity.** Gain peace of mind knowing Tamarac Reporting is a web-based platform. You can access it anywhere or at any time with unlimited users. Your data is housed in our enterprise-class data center, always protected by redundant systems and rigorous disaster recovery plans.

What our clients have to say about Tamarac Reporting



Implementing Tamarac was one of the best investments we've made. This partnership truly transformed the way we do business, by eliminating paper, increasing efficiencies, reducing the potential for trade errors, and streamlining our workflows.

- *Corrado Financial Group*

As a result of our partnership with Tamarac, we've been able to grow our business in a way we could never have before. Tamarac's advanced technology provides us with real operational efficiencies, and we're equipped to deliver a better client experience and a higher level of service.

- *Financial Consulate*

Our business model required a technology partner to support the productivity of our business and a platform that offered advisors the most advanced tools available. Only Tamarac could provide what we needed.

- *Dakota Wealth Management*



Take the next step to a more powerful technology solution

When you make your back-office processing that much more efficient with Tamarac Reporting, you can focus on what matters the most: your clients. Ask the Tamarac Sales Team for more information on our award-winning capabilities and unique PortfolioCenter promotions.

Learn more about how Tamarac Reporting can empower your firm to operate with greater efficiency and profitability.

Call 844.214.8152 or email sales@tamaracinc.com

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