

# Next Generation Reports Available Now<sup>ρ</sup>

PureFacts' PureReports technology is a wealth management game-changer. It incorporates artificial intelligence (AI) and machine learning (ML) to deliver insights that can help businesses move from being reactive to proactive. PureReports can help advisors understand the meaning behind the metrics and deliver on what's important to their clients.

PureFacts' technology pulls data from all your warehouses, custodians, in-house and partner systems. It derives key metrics from your sources, audits results to ensure accuracy across multiple platforms, reconciles the data and returns it to your source systems. This process improves your data and provides users with an accurate view of your consolidated intelligence.



## PureFacts advances your business

### Removes Unproductive Processes

- » Automates rote tasks, freeing up advisor time to focus on building business
- » Best value solution with lowest total cost of ownership
- » Eliminates many manual back-office operations

### Increases Transparency

- » Dashboards at the enterprise and advisor level allow for a multi-level view of the business
- » Client portal is personalized, contextual and easy to use

### Improves Service Quality

- » Creates cross collaboration opportunities between business units and improves SLA's
- » Highly integrated, flexible, scalable, and reliable architecture makes it easy to grow your business without interruption

### Reduces Risk

- » Helps maintain compliance at all levels
- » Supports client retention with an optimal user experience

# PURΣFACTS

# Key features



A hosted, mobile-first multi-platform solution that is integrated, flexible, scalable and secure



A solution that integrates to your enterprise data warehouse, as well as core banking, financial planning, portfolio management, trading, custodian, CRM, & market data systems



Easy-to-use, guided workflows that take the guesswork out of operations



An integrated solution that delivers insights with the use of advanced ML & AI



Supports data-driven decision making to help maximize the value delivered to investors, while driving acquisition and retention of advisors



A delightful user experience that is personalized, contextual, & orchestrated

PureFacts Financial Solutions is the market-leading provider of software solutions for fee and commission management. We work with more than 100 of the world's leading banks, asset and wealth managers, brokerage firms, custodians, fund administrators, insurance companies and transfer agents.

## PUREFACTS

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