

Deliver Better Plans While Building Your Bottom Line

PureFacts' decumulation technology revolutionizes the way advisors help their clients plan for retirement income. The technology is a leading-edge, cloud-based tool that integrates into enterprise platforms.

As baby-boomers retire in great numbers, financial services firms with the best decumulation tools will be more able to grow their businesses by encouraging investors to consolidate their accounts.

The PureFacts decumulation technology has a unique algorithm that quickly and efficiently identifies the retirement income strategy with the potential to save your clients the most money. It is intuitively designed and easy to use, accounts for all sources of retirement income, is always current with the Canadian tax code and simplifies the complex task of income planning.

PURΣFACTS



PureFacts advances your business

Save Clients Money

- » Calculates multiple options for each client and may help them save thousands of dollars

Improve Service Quality

- » Takes the complexity out of retirement planning by comparing the outcomes of multiple withdrawal scenarios
- » Calculates the plans immediately and improves your client meetings

Decrease Client Anxiety

- » Alleviates the number one worry of retirees - outliving their savings

Key features



Easily integrated into existing tech stacks



Scalable, flexible, and secure



Easy to use, intuitive and adaptable



Driven by AI and machine learning insights



Responsively designed for mobile and browser-based use



Software remains current with monthly and quarterly updates

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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