



PortfolioCenter:

5 Reasons to Move From Desktop Software to Cloud

Spend your time managing your business—not your technology. Whether you are an existing desktop client or an emerging RIA, the transition to our cloud solution may be easier than you think.

Here are five reasons to make the move:

1

Reduce IT Overhead and Resource Drains

Pure and simple—with PortfolioCenter Cloud™, there's no need to spend time and resources on upgrades, system compatibility, or networking. We take care of the technology, so your team can focus on what it does best.

2

Control Technology Expense

Consider what you pay for today—then factor in upgrade costs for SQL Server®, operating systems, and regular hardware replacement. With quarterly fees for PortfolioCenter Cloud, you can reduce these additional costs and take the guess work out of budgeting.

3

Access Portfolio Data Anytime, Anywhere

Get the freedom to run reports, analyze data, and make informed decisions wherever you are, whether on the go or onsite with a client. PortfolioCenter Cloud makes it possible with convenient online access to your clients' portfolio data.

4

Know Your Data Is Secure

From super storms to cyber threats, disasters have a way of exposing the vulnerabilities that businesses face when they house technology internally. Gain peace of mind with PortfolioCenter Cloud. Your data will be housed in an enterprise-class center, protected by highly redundant systems and rigorous disaster recovery plans¹.

5

Grow Your Business Without Technology Limitations

If your firm is thriving and you're ready to expand, the last thing you want to deal with is buying and setting up new technology. With PortfolioCenter Cloud, you won't need to. Simply add more users as you grow.



Looking for other ways to become more efficient?

Besides cloud portfolio management, we offer solutions for integrating key technologies and outsourcing your operational tasks such as data management and reporting activities.

Ask the Tamarac Sales Team for more information on these additional outsourcing options.

Learn more about what PortfolioCenter Cloud can do for you.

Call 800-528-9595 (option 3)
or email TPC-Sales@envestnet.com

tamaracinc.com/pccloud

¹ To access a complete copy of Envestnet's Business Continuity Plan, please visit envestnet.com/business-continuity.

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