

PORTFOLIO MANAGEMENT SOLUTIONS THAT KEEP YOU AHEAD.

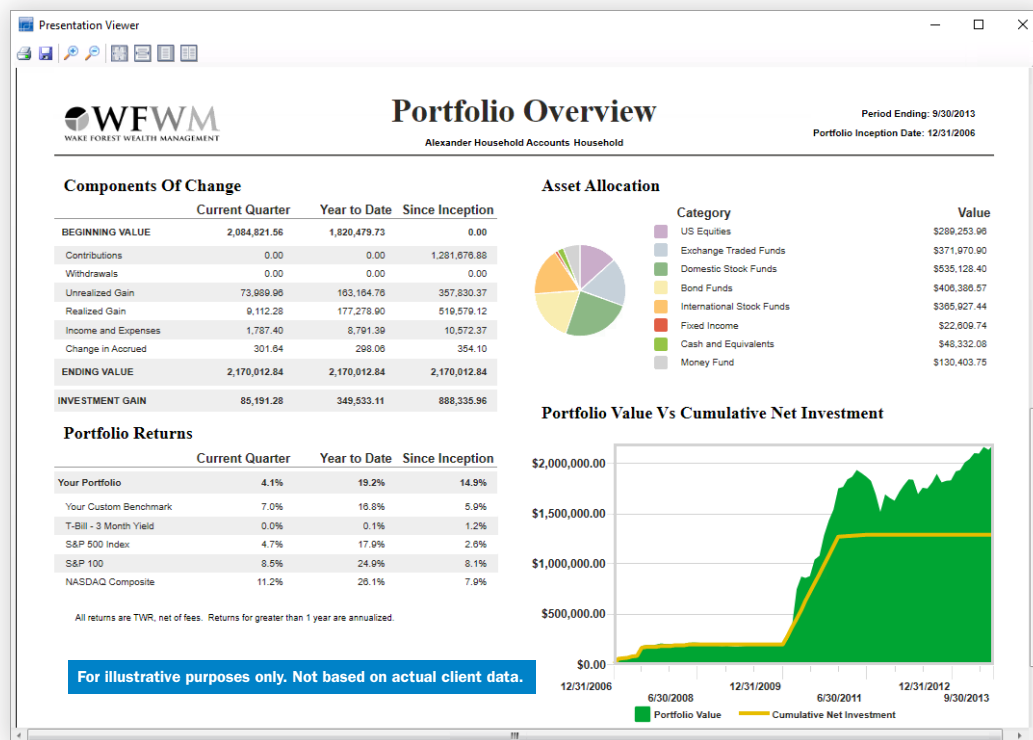
Set Your Firm up for Success

PORTFOLIOCENTER CLOUD™ PROVEN SOFTWARE YOU MANAGE IN OUR DATACENTER

Consider this choice if you want to:

- Simplify processes
- Retain control in-house
- Recognize efficiencies with ready made templates
- Access your data any time, from anywhere
- Never worry about hardware specifications or product upgrades again

Emerging practices seeking to create efficiencies, enhance their client reporting, and streamline billing at an affordable price choose PortfolioCenter Cloud. This trusted portfolio accounting software provides the building blocks for success that can grow with you. As your business expands, you may want additional features and functionality to help streamline your business. With PortfolioCenter Cloud, you can easily add industry-leading Tamarac Reporting, Trading, and CRM without the need for data conversion, which means no disruption to your firm. Why choose any other platform to help scale and grow your business?



YOU MAKE THE RIGHT DECISIONS FOR YOUR FIRM'S CLIENTS.

MAKE THE RIGHT DECISION ABOUT YOUR PORTFOLIO MANAGEMENT SOLUTION.

COMMUNICATE EFFECTIVELY.



FLEXIBLE,
CUSTOMIZABLE
CLIENT REPORTS AND
MULTIPLE BILLING
OPTIONS HELP YOU
DEMONSTRATE YOUR
FIRM'S VALUE TO
CLIENTS AND RECEIVE
TIMELY PAYMENT.

DEMONSTRATE YOUR FIRM'S VALUE.

PortfolioCenter Cloud gives you the reporting flexibility to communicate information in a way that helps clients fully understand how their investments are being managed and how you provide value as their investment advisor.

Report what's relevant. With over 70 standard client reports and 100 available report columns, you have maximum flexibility to determine the type of information to display.

Communicate effectively. Choose the look and feel and the level of detail for individual reports to reflect each client's situation and information preferences.

Present professionally. Add your company logo to reinforce your firm's brand.

Simplify distribution. PortfolioCenter Cloud makes distribution easier with a selection of options to prepare professional, multi-report packages, print in batches and create PDFs for electronic distribution and archiving.

Retain Control. We do the daily downloads to simplify your processing, while you maintain control of your data and reconciliation.

RECEIVE TIMELY PAYMENT.

PortfolioCenter Cloud provides multiple billing options, so you can bill clients based on their preferences while making sure you receive timely payment for your firm's services.

- **Exclude specific assets**
- **Adjust totals for minimum fees**
- **Bill by security type or other category**
- **Bill in arrears or in advance**
- **Charge fees by household or account**

Disclosure

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