Technology for Better Advice and Stronger Client Relationships

PureFacts technology provides a “shared screen” experience for the advisor and investor. It helps move the investment conversation from transactional to one that has a deeper resonance for the investor – their life goals and how to achieve them – with the right advice.

PureFacts advances your business

Strengthen Client Relationships

» Move client/advisor relationship from transactional to one that is based on advice over a lifetime

» Provide a clearer understanding of individual investor goals and increase engagement

Increase Advisor Productivity

» Easy to use with guided workflows and intuitive interfaces that are delightful to use

» Make insight-driven decisions to maximize value and drive retention

Reduce Cost

» Remove process inefficiencies, reduce operational errors and processing time

» Trim the cost of sales with straight-through-processing

Reduce Risk

» Improve information accuracy

» Comply with regulations and internal rules

Improve Service Quality

» Stable, scalable, flexible, and reliable technology

» Eliminate onboarding errors

» Fund accounts faster

PUREFACTS

Key features

PureFacts technology seamlessly integrates with your existing systems

Fully customizable workflows

Uses your firm's risk tolerance scoring systems and portfolios

Helps ensure all regulatory requirements are met

Automatic rebalancing

Supports wet signature and fully paperless

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.

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www.purefacts.com

CA +1 416 598 1241
US +1 617 594 5900
CH +41 44 200 22 44
UK +44 207 464 4370