



Palette Platform™

REPORTING AND INTEGRATED SYSTEMS

Our latest innovation, Palette Platform,™ is an open architecture integration of systems and capabilities customized to the varied needs of private wealth firms. It provides a complete view of the client relationship, and leverages powerful tools that can improve your efficiency and effectiveness. Palette Platform, combined with our private wealth aggregation and custom solutions services, helps strengthen client relationships and differentiate you from your competition. Capabilities include:

- **MIS (Management Information System)**

- Surface and centralize key information
- Transparency of internal process
- Better management of firm initiatives

- **Sophisticated Reporting (with full multi-currency)**

- Create and measure a custom security master
- Measure against targeted asset allocations, custom, blended and industry benchmarks
- Report specific investment holdings under a custom line item
- Daily time-weighted, IRR and customized performance calculations

- **Intelligent Dashboards™ and Pivot Analyzer™**

- Analyze a portfolio firm-wide or within a family
- Evaluate composites, custom line items and security masters
- Drag and drop functionality

- **Advanced Document Management**

- Self-service, 24/7 accessibility
- Custom tagging for easy search and retrieval
- Embedded document viewing and annotating
- Approval and publishing processes

- **CRM Integration**

- Extensive contacts, notes and event notifications
- Closely track prospects and opportunities
- Powerful, customizable reporting capabilities
- Access to the Advisor Toolbox and Billing data

- **Client Billing**

- Robust features of premium system
- Transition away from number-crunching
- Focus on analysis and decision-making
- Illuminate profitability of products, clients and relationships

- **Collaboration Center™**

- Virtual team environment that promotes greater efficiencies and effectiveness
- Electronic forms for efficient direct client updating
- Workflow monitoring and management
- Collaborative calendar and planning tools

187 Danbury Road
Suite No. 202
Wilton, CT 06897
(203) 762-9006

www.pcrinsight.com