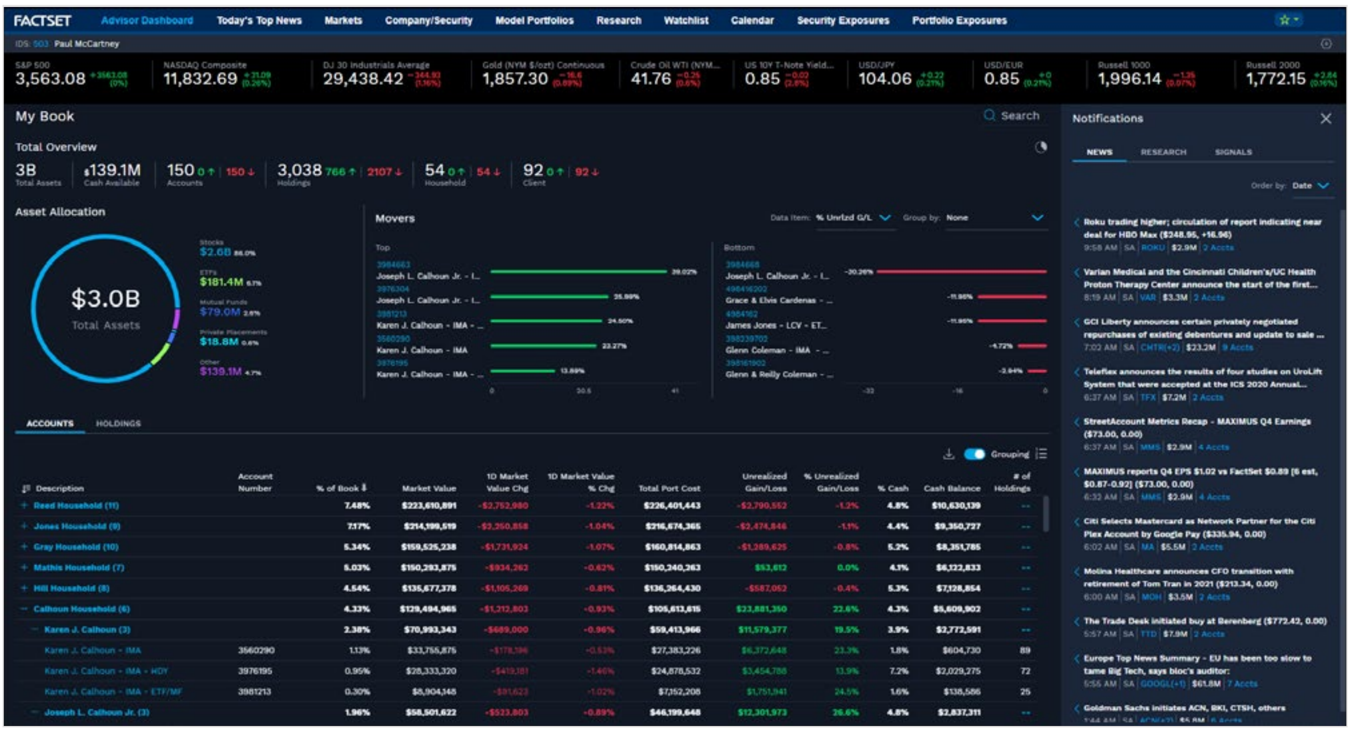
Solutions for Wealth Managers

Demonstrate your value to clients and prospects while protecting and growing their assets with a single solution that combines institutional-grade content, analytics, and digital technology.



LEVERAGE AN OPEN AND FLEXIBLE SOLUTION

Increase productivity and lower your total cost of ownership by replacing disparate systems with FactSet. Leverage our open and flexible technology and eliminate dependence on locally-installed applications with a comprehensive and intuitive web workstation. Support different workflows across the enterprise by integrating web components into internal dashboards, portals, or CRM apps. Improve advisor efficiency, enable client engagement, increase home office collaboration, and streamline operations while reducing cost to income.

DRIVE ADVISOR PRODUCTIVITY AND EFFICIENCY

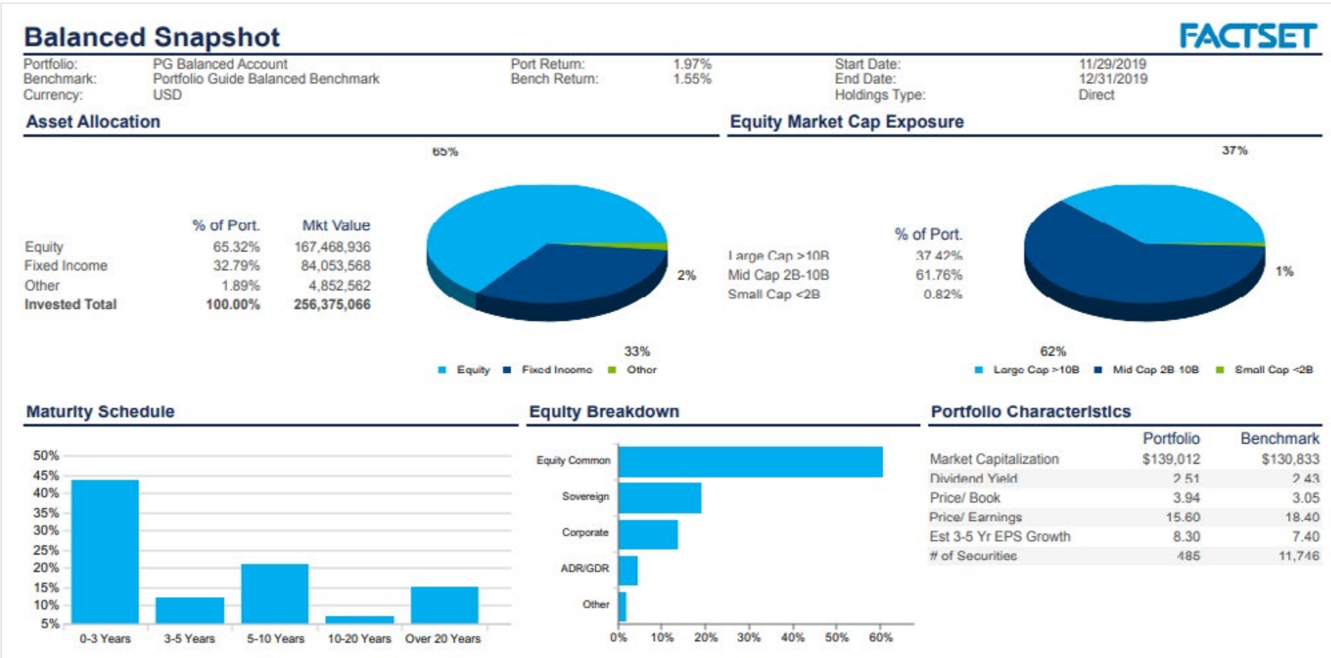
Put your clients first and drive engagement with an intuitive, responsive, and integrated wealth management dashboard that positions your entire book of business at your fingertips. Access all your accounts in one consolidated view with a dynamic interface, personalized for each advisor. Quickly evaluate and communicate real-time market impacts with your clients.

ACCESS COMPLETE MULTI-ASSET CLASS CONTENT

Analyze companies, fixed-income instruments, fund analytics, economic content, news, and more. Meet your client's sustainability goals and take conversations to the next level by harnessing FactSet's robust, comprehensive ESG content. Gain instant access to crucial, real-time news and intelligence for the companies and markets your clients care about with FactSet StreetAccount.

Screen for multiple asset types and leverage FactSet's fund and ETF screening tool-powered by machine learning and voice technology-to return relevant results in seconds. Review financial statements, broker estimates, geographic revenue exposure, and supply chain details.

Access contributed pricing, terms and conditions data, and derived analytics for fixed-income securities. View Fund & ETF profiles along with in-depth data and analytics of their holdings in one comprehensive screen.



IMPROVE ACCESS TO INTERNAL RESEARCH

Boost collaboration with your internal research team with FactSet's centralized research repository. Easily view internal price targets and recommendations alongside real-time market data for client holdings. Enhance portfolio construction with the ability to monitor performance and view the composition of internal buy lists and model portfolios.

ENHANCE REPORTING AND STREAMLINE CLIENT COMMUNICATION

Increase engagement with current clients and market your services to prospects with robust and insightful portfolio analytics and reporting solutions. Prepare client-friendly reports to show performance, characteristics, and composition of individual accounts and overall client relationships. Uncover sector and asset class exposures by expanding your clients' mutual fund and ETF holdings into their respective underlying constituents.

Leverage FactSet's asset allocation tool to build optimal portfolios based on flexible capital market assumptions and simulate the performance of various asset allocation strategies with FactSet's Monte Carlo model.

PROVIDE AN ENGAGING CLIENT ONLINE EXPERIENCE

Deliver the transparent, personalized experience your clients demand. Leverage FactSet's powerful digital solutions to provide clients with tailored, proactive advice via a secure portal, satisfying the wealth management community's growing desire for timely insights and more active participation. Maintain engagement with your entire book and grow your pipeline using tools built to support the advisor workflow with reduced effort.