

Excelsior Cleaning Products, Hong Kong

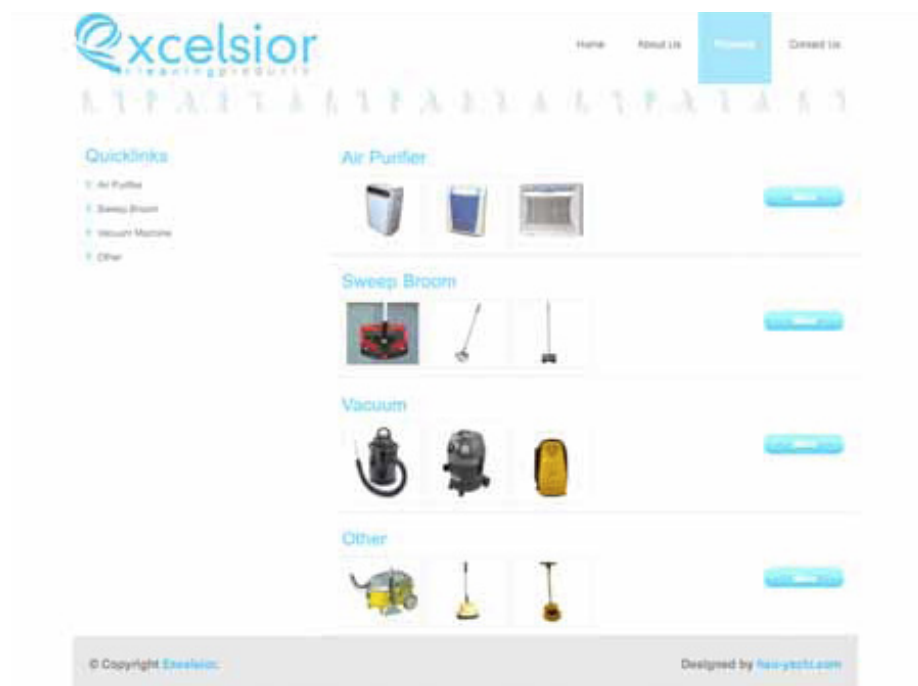
Logo (商標)



Business Card (名片)



Websites (網頁)



YuanShen Hardwares Co., Ltd. 元紳有限公司

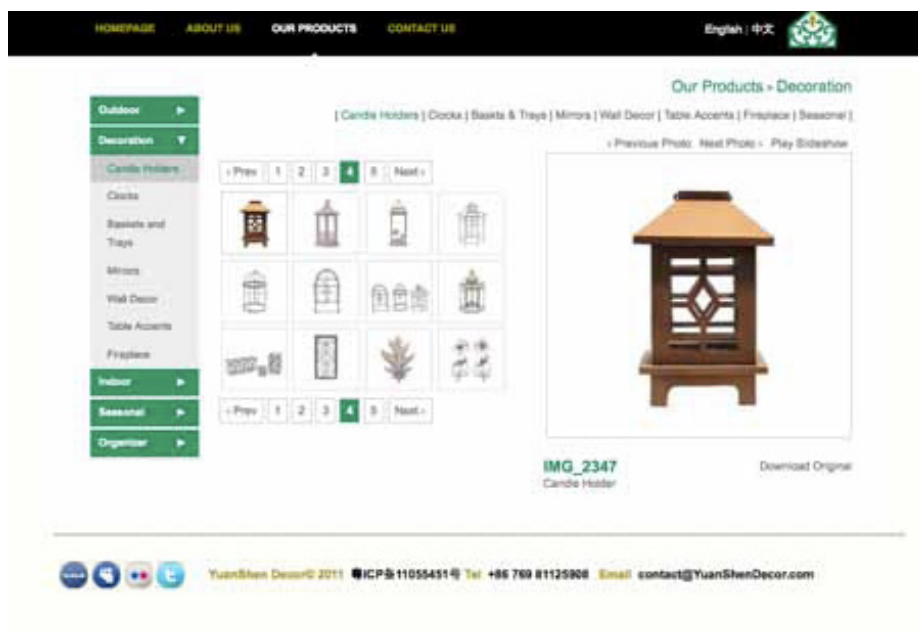
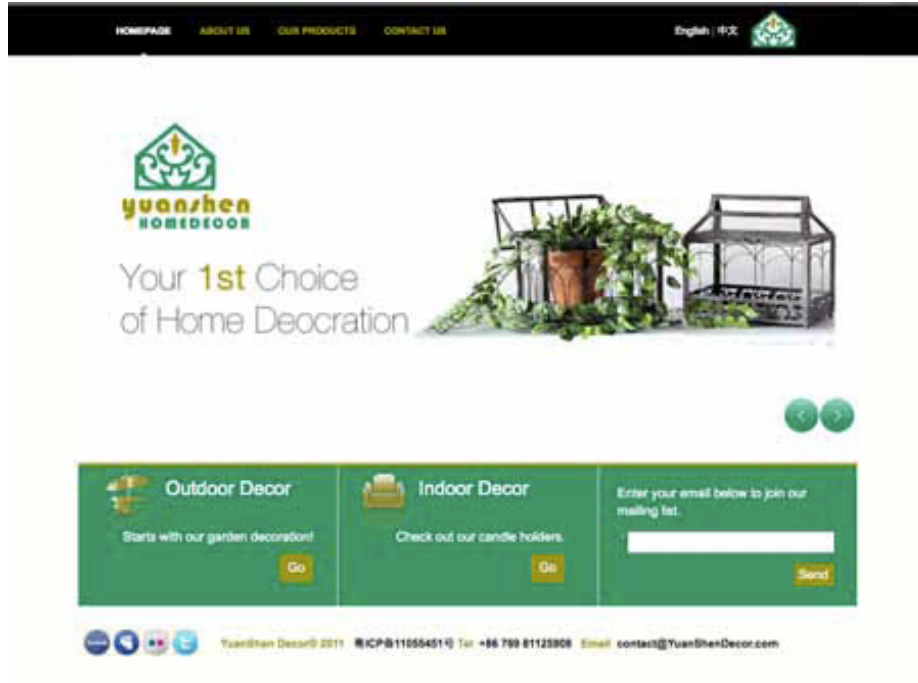
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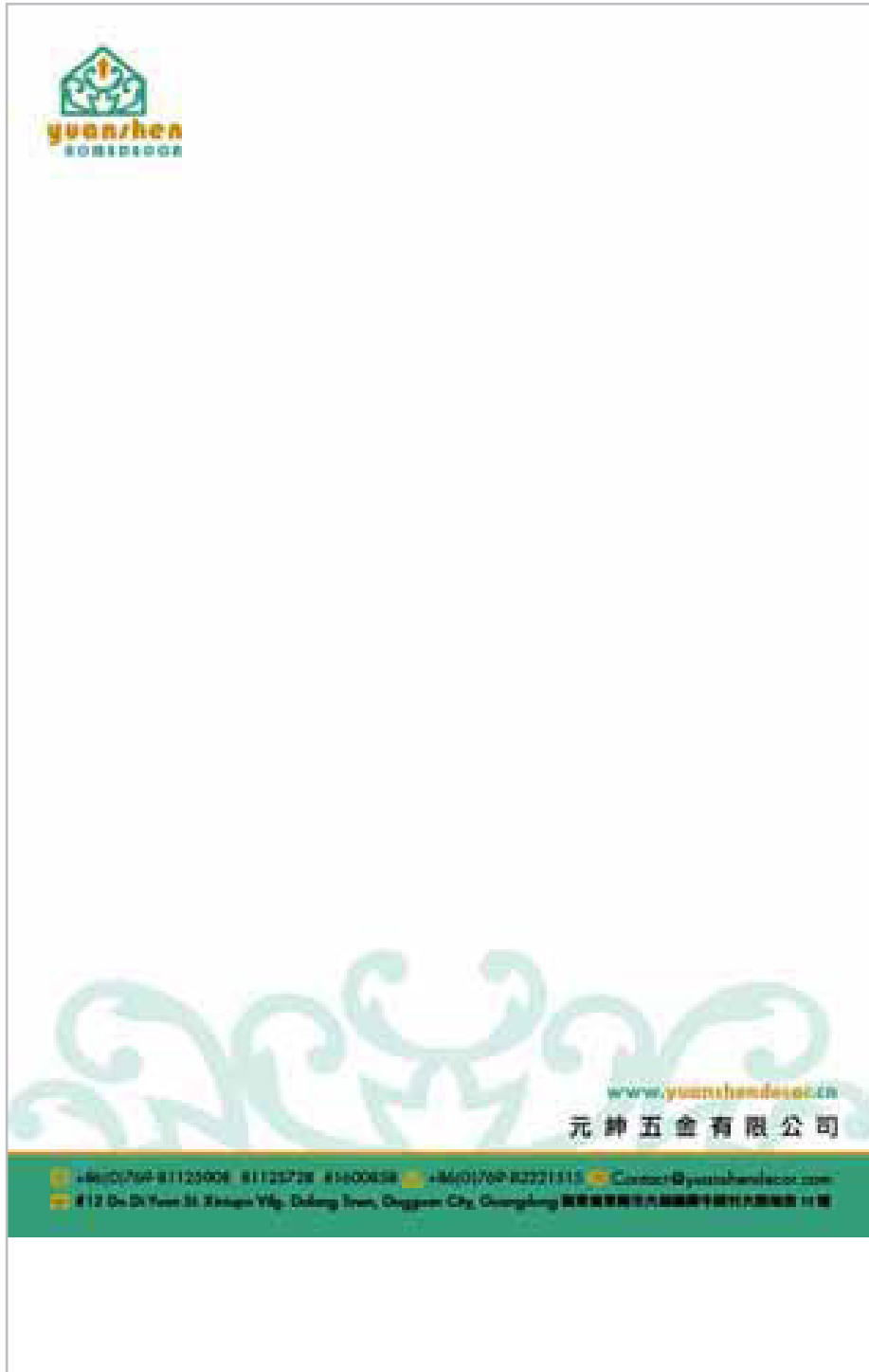
Business Card (名片)



Websites (網頁)



Notepad (備忘錄)



Advanced Objects Inc., Chicago

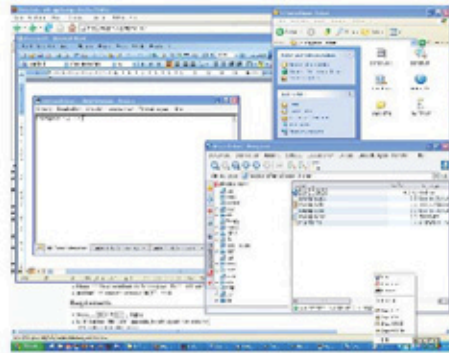
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Websites (網頁)



Portfolio360



An advanced portfolio construction and proposal system that helps build deeper client relationships and grow AUM. Available to 15,000+ advisors at some of the nation's most respected Broker/Dealer firms, Portfolio 360 has generated more than 90,000 proposals totaling \$150 Billion since 2007.

Portfolio360CaseStudy

- [View an online demo >](#)
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Portfolio360Resources



"Insert quote here about how wonderful P360 and Advanced Objects are. Some kind of 'business results' testimonial would be good too."

Firstname Lastname
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Portfolio360Features

Personalized Risk Profile
Portfolio360 uses a profiling process to evaluate the client's current portfolio and measure the client's risk tolerance. The result is a risk profile that compares the risk rating of the client's current portfolio to the risk rating of the proposed portfolio. The profile can be customized to include your firm's specific criteria.

Asset Allocation
The asset allocation part of the platform allows you and your firm to create highly customized investment plans or to use a predefined set of investment options and portfolios based on each client's preference and your firm's or your investment partner's investment offerings. Portfolio360 provides a wide range of investment plan analysis tools to help advisors and clients evaluate their proposals including risk-return analysis, diversification analysis, historical performance analysis, returns analysis (before & after fees), and Monte Carlo analysis.

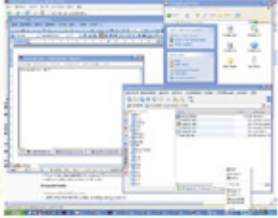
Investment Manager Selection
Portfolio360 includes a complete selection of mutual funds, Separately Managed Accounts (SMA), exchange traded funds, equities and fixed income investments. Advisors can select from this broad array of investments or predefine a set of preferred investment options and portfolios from specific investment managers or broker-dealers.

Client Proposal Generator
Once the advisor has developed a financial plan, proposed an investment strategy and recommended an investment plan Portfolio360 allows the advisor to quickly and easily generate a highly professional comprehensive client proposal with full color graphics. The ability to deliver a high-quality investment proposal instantaneously enables advisors to capitalize on opportunities immediately and make a positive impression on the client.

Investment Policy Statement and Advisor Contract
The Portfolio360 platform generates a signature-ready investment policy statement (IPS) that integrates all the information collected in the profiling process and the investment recommendations made as a result. This enhances the communication process with the client and reinforces the investment compliance process.

Account Opening Documents
Finally, your firm's account opening documents can be integrated into the Portfolio360 platform to create an end-to-end solution. The result is a complete process for capturing a client, developing a sound investment portfolio, documenting the relationship, and implementing the account.

Tear Sheets (產品說明)



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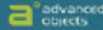
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Product Icons (產品商標)

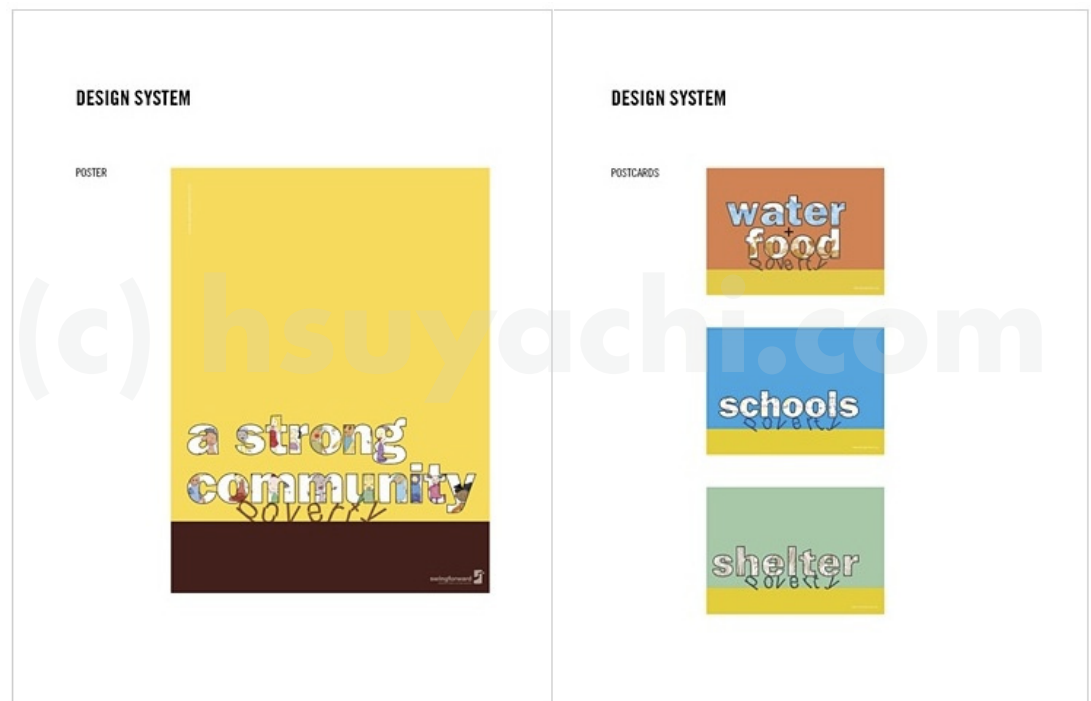


Advanced Objects Inc., Chicago

Logo (商標)

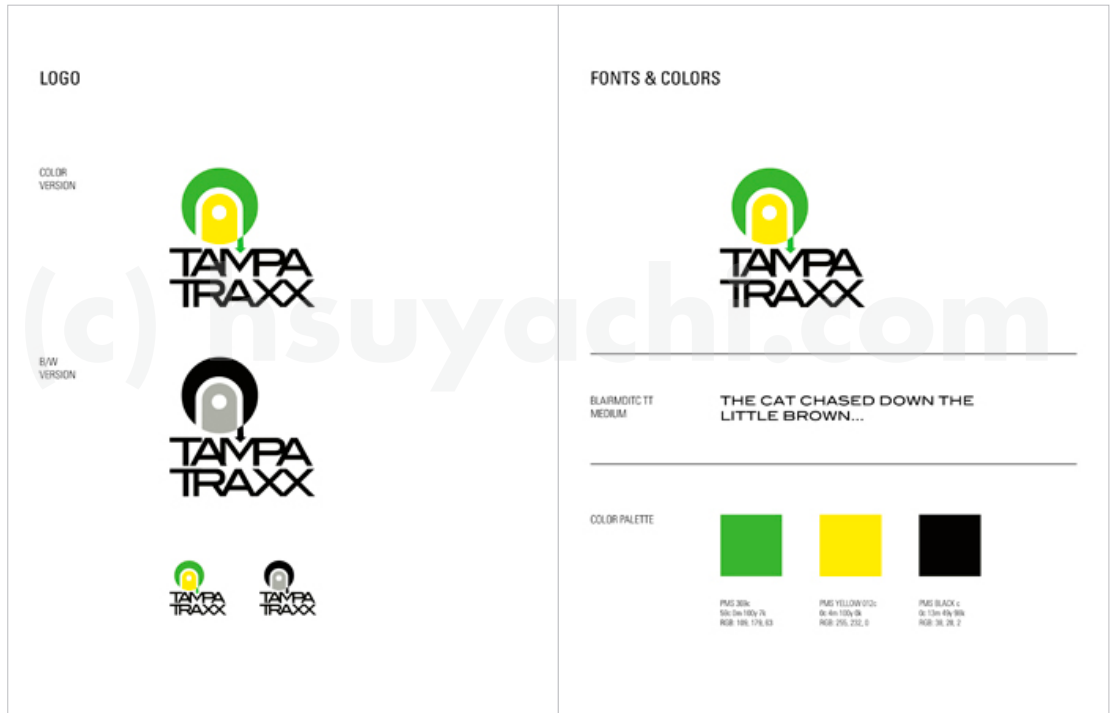


Poster and postcards (海報 & 明信片)



TampaTraxx Inc., Chicago

Logo (商標)



Poster and postcards (海報 & 明信片)

