



PortFini

Fixed Income Portfolio Presentation System

Financial advisors need robust tools that are efficient and easy to use. That's why we developed a web-based, cloud-hosted, portfolio modeling and presentation system specifically for them. PortFini makes it easy for an advisor to model a client's existing portfolio holdings in a single consolidated view and illustrate the effect of proposed enhancements. Some of the nation's most successful advisors use PortFini in selling and communicating with existing clients as well as making proposals to gather assets from new clients.

The PortFini Advantage

Capture your prospects' contact information, tax profile, current holdings, and investment goals to model their current portfolio.

Identify new purchases or sale of existing holdings to the portfolio to meet the investment goals of the prospect.

Generate a complete portfolio presentation proposal in minutes as a printable PDF or packaged for delivery by email.

Close the sale by using your knowledge and experience to highlight key data in the presentation charts and graphs.

Features:

- Analyze, illustrate, and explain the effects of proposed purchases and sales on key portfolio measures such as average yields, duration, convexity, and maturity.
- Broad market coverage allows advisors to support a broad range of fixed income securities in client's portfolios.
- Demonstrate professional expertise by showing how new purchases or sales would affect the client's portfolio performance.
- Existing portfolios can be copied and modified to show 'what-if' scenarios.
- Model a portfolio and generate sophisticated sales presentations in minutes.
- High-quality presentations directly impact the advisor's close rate when opening new accounts and bringing in securities from held-away accounts.
- Standards-compliant calculations are incorporated into the system to ensure accurate and consistent results on the report.

Key Benefits:



Flexible

PortFini is a solution designed to scale with the growth of your business. We'll work with you to understand your organization's current technologies, consider your challenges, and help you design a solution that optimizes performance and reliability.



Technology

PortFini's tool is web-based making it flexible and easy to access from any web browser. Your data is also securely managed and professionally hosted ensuring maximum security, and no downtime.



Full Service

At FT Labs, we partner with our clients to provide high-performance workflow automation tools that increase productivity, reliability, and profitability of traders and firms active in the fixed income markets.



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Reporting Features:

PortFini offers you immediate access to well-designed, accurate, and high quality portfolio presentation reports.

- Enhance the client's understanding of their portfolio through graphical representation of portfolio attributes and summary reports.
- Enhance professional reputation, credibility, and standing by consistently providing high-quality portfolio reports to clients.
- Eliminate bottlenecks in selling fixed income securities by generating reports containing key information without overwhelming the client with excessive detail.
- Report customization options allows the advisor to better meet the information needs and goals of the specific client.
- Reports allow easy comparison of taxable and tax exempt securities based on the client's specific tax situation.
- Simple and clean designed reports make it easy to illustrate and answer the most common questions a client may have about their portfolios.

About Financial Technology Laboratories

Our mission is to provide our clients with high-performance workflow automation tools that increase productivity, reliability, and profitability of traders and firms active in the fixed income markets. Established in 2005, Financial Technology Laboratories, Inc. (FTLabs), has become a leader in financial software development and technology consulting specializing in delivering innovative technology solutions for the fixed income securities market.

FTLabs provides fixed income calculation and analytics software components, system integration software using the Financial Information eXchange (FIX) protocol, fixed income and electronic trading solutions, custom software development, and consulting services to broker-dealers and software vendors in the bond market. We are more than developers and consultants. Our people have been at the forefront of fixed income technology business for more than 20 years. We are the technology experts that understand the bond markets and will take your business to the next level.

For more information or to contact us go to ftlabs.com or call 321.248.4248.

