

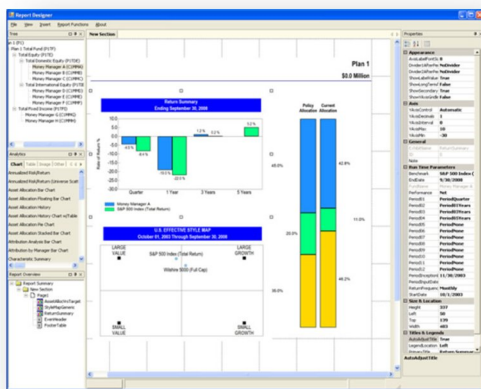
REPORT ESSENTIALS...

Clients are demanding more from their institutional investment consultant. They want more sophisticated performance analysis and reporting along with an increasing level of service. If you are a smaller consulting firm, you need a solution that fits your budget and your resources. InvestorForce now provides that solution.

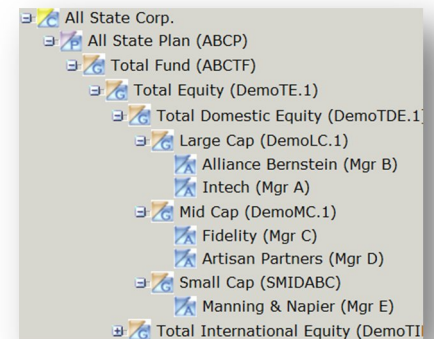
Introducing **REPORT Essentials™**, a powerful, robust and fully hosted performance reporting solution for smaller institutional investment consultants.

InvestorForce REPORT Essentials™ uses the same revolutionary performance reporting engine that powers our industry leading REPORT product. So you get an affordable, state-of-the-art technology solution that delivers competitive advantage.

REPORT Essentials™ is packed with features such as our advanced report design tool that allows you to create custom, publish-ready performance reports quickly and run them period after period with a few simple clicks. Our advanced “plan tree structure” enables you to model any plan, no matter how complex, and easily calculate account performance and roll it up to any composite level you’ve defined.



Design Custom Reports with Ease



No Plan is too Complex for
REPORT Essentials™

But **REPORT Essentials™** doesn't stop there. Easy data import, access to a large collection of industry data and benchmarks, and the ability to tap a rich library of analytics ensures that you'll have all of the tools you need to take your performance reporting to the next level. And best of all, **REPORT Essentials™** can be easily expanded as your firm expands, so you'll never have to worry about outgrowing your solution.

Everybody likes to save time and money. **REPORT Essentials™** will help you streamline your performance reporting process and reduce the manual and time consuming efforts you apply today. You'll see the benefits in your bottom line. With **InvestorForce REPORT Essentials™** you not only get industry leading technology, you also get the industry leading technology partner, a powerful combination for success.

Features and Benefits

- Streamlines all aspects of your performance reporting process with a single, fully integrated, end-to-end solution.
- Easy data import gets you “report ready” in no time.
- Model any plan – from the simplest to the most complex.
- Easily calculate account performance with automatic roll up to all composite levels.
- Access to a wide array of benchmarks, indices, and universe data.
- Select from a rich library of analytics which allow extensive customization of data sources and output formats.
- Automatically generate professional, custom performance reports that are “publish-ready” and can be saved and run each reporting period.
- Easily add external documents, free-form text and annotations, and global or plan level commentary to your reports.
- WYSIWYG (what you see is what you get) report designer lets you easily create performance report packages as simple or as extensive as you need.
- “Live” report objects return real data when you are designing your reports. Know how your report will look before you run it!
- All the data you need for your reports is contained in the **InvestorForce Performance Reporting Network®** database. Single data source, one reporting tool.



Produce High Quality, Content-Rich Performance Reports

Contact Us

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