



PureStatements

Create custom client statements that carry your organization's DNA quickly and easily.

OVERVIEW

You work hard at building your reputation, so don't settle for cookie-cutter client statements. Underline your brand every time you communicate with your clients with reports generated by PureStatements. Not only does PureStatements help you project exactly the image you choose, it streamlines the statement generation process, making it so quick and easy that you can create customized statements at any time.

OFFER YOUR CLIENTS CLEAR, PERSONALIZED STATEMENTS

PureStatements is a powerful, sophisticated client statement generator that allows you to communicate to each and every one of your clients the specific information they demand. Personalize your communication with introductory letters and commentary, as well as optional sections and inserts.

Present data in a way that makes the most sense to your clients. Not only can you present the details of holdings, asset allocation, transactions and performance, but you can also provide important summaries and analyses such as commentary from your internal experts. Add an additional visual impact with rich graphs, tables, and charts.

TAILOR-MADE STATEMENTS THAT REPRESENT YOU, NOT A THIRD-PARTY VENDOR

It's your good name and your reputation, so shouldn't you be able to control all aspects of your brand? Other statements packages allow minimal customization, but PureStatements allows you to fully customize the look and feel of your client statements. Take control of the layout and content of your statements and customize the look and feel to reinforce your organization's branding efforts. Include your logo, corporate fonts, styles, colours, and much more.

IMPROVE CLIENT SERVICE WITH QUICK AND EASY REPORTING

If it currently takes you hours or even days to create client reports, you probably don't look forward to meeting your regular reporting requirements. And you certainly don't want to have to create any extra client statements.

But with PureStatements' user-friendly interface, in a just a few minutes you can create reports at the account, client, or group level with just a few clicks. Now the idea of taking along an up-to-the-minute report for a client to show them how they're doing is completely feasible.

KEY BENEFITS

- Cut down on the time it takes to create client statements
- Brand your statements to reflect your company's character
- Add value for your clients with detailed, insightful client statement packages
- Take up-to-date statements along to client meetings to show their real-time progress
- Personalize statements for each individual client

FEATURES

- Instantly generates automated reports
- Offers flexible grouping levels – by account, client or group
- Allows fully customized content and design

Monthly and quarterly reports are just as quick and easy – and with fully customized graphics, they reinforce your company’s messaging at every opportunity.

- Quickly generate client statement packages on demand
- Efficiently create large batches of personalized client statements
- Easily customize a statement to exact specifications

ABOUT PUREFACTS

PureFacts has a ten-year track record of successfully developing information management software to keep businesses responsive and nimble – both today and tomorrow.

We do much more than design and sell software. We bring CEOs and CIOs together through access to high quality, reliable and useful information on every aspect of operating and financial performance. When finance and information technology teams talk in terms both can understand, information quality improves – as does the ability to manage the enterprise.

This is where we come in. Not only will we help you build bridges within your business using collaborative tools everyone understands, but we’ll also show you a healthy and consistent return on your investment.



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