

# Driving Business Value

Investment forecasting tool improves ability to advise clients.

## Scenario

An outsourced investment solution provider designs tailored financial portfolios for high net worth individuals, private foundations, trusts, estates and taxable institutions.

Each client's unique risk tolerance and goals are integral components that drive agents' investment recommendations. The company realized that the system it has been using was rigid and prevented representatives from properly forecasting potential gains or risks associated with different opportunities.

Agents were spending large amounts of time calculating scenarios, a process that was costly to the business and frustrating to clients. Reports could only be put together for individual portfolios, preventing a holistic view of the business.

AltSource built a custom portfolio assessment tool that enabled financial professionals to better advise clients in an efficient, sustainable manner. The move from a desktop application to a web app also provides a centralized database and a single source of truth.

## Solution Features

- Allows representatives to input proposed investment changes and see projected results in real time.
- Enables clients to make more accurate decisions about their investment options and strategies.
- Gives detailed view of potential gain associated with a new or changed investment.
- Provides accurate information to be used for asset allocation decisions.
- Firm-wide reports track asset allocation, variance, valuation, change projections and more.
- Automated approved actions to see what buy/sell actions would be needed, providing clarity and increased efficiency.
- Pulls information from external source with the option for a multiday import of data.

## Business Impact

- Enabled agents to calculate potential investment outcomes in less time, facilitating faster decisions and actions.
- Reduced time needed to review buy/sell action by up to 2 hours per day.
- Allowed agents to serve clients more efficiently.

