



# wealth management **YOUR WAY**



## FEATURES

- PORTFOLIO MANAGEMENT
- MULTI-CUSTODIAL ACCESS
- SEAMLESS BACK OFFICE INTEGRATION
- SECURITIES AND ORDER MANAGEMENT
- POOLED FUNDS
- COMPLIANCE
- CLIENT RELATIONSHIP MANAGEMENT
- ADVANCED REPORTING
- ELECTRONIC TRUE CUSTOMER PROFILE
- TRADING & BATCH TRADING
- BROKERAGE

## F-ENGINE OVERVIEW

F-Engine is an **advanced integrated portfolio management solution** for financial and brokerage institutions, Wealth Managers as well as family offices.

F-Engine perfectly integrates with your existing back office systems and allows multi-custodial access. In fact, it is the only application on the Canadian market that supports as many custodians and offers as many multi-custodial functionalities.

What is unique about F-Engine is its ability through its patented consumer profiling approach – **Electronic True Customer Profile** or **eTCP** – to use technology to create a client profile that helps **address investors' real needs**.

**This increases your investor's satisfaction and helps you retain clients and assets under management.** The combined adequacy of financial products and clients' needs will **undoubtedly boost your business**.

You are **guaranteed immediate cost savings** due to operational efficiencies as well as **increased revenue** through intelligent client data management.

F-Engine lets you **minimize administrative tasks** (software maintenance, data aggregation, etc.) and **maximize client interaction** in order to build strong lasting relationships.

With this integrated platform you can manage all of your activities with one single platform – not modules like the majority of the competition – which **decreases:**

- Software acquisition and maintenance costs
- Integration related issues
- Employee training time and learning curve

F-Engine helps you **improve your performance** by offering the most holistic view of your investors' portfolios the market has to offer.

Contact us and see how we can help you :

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