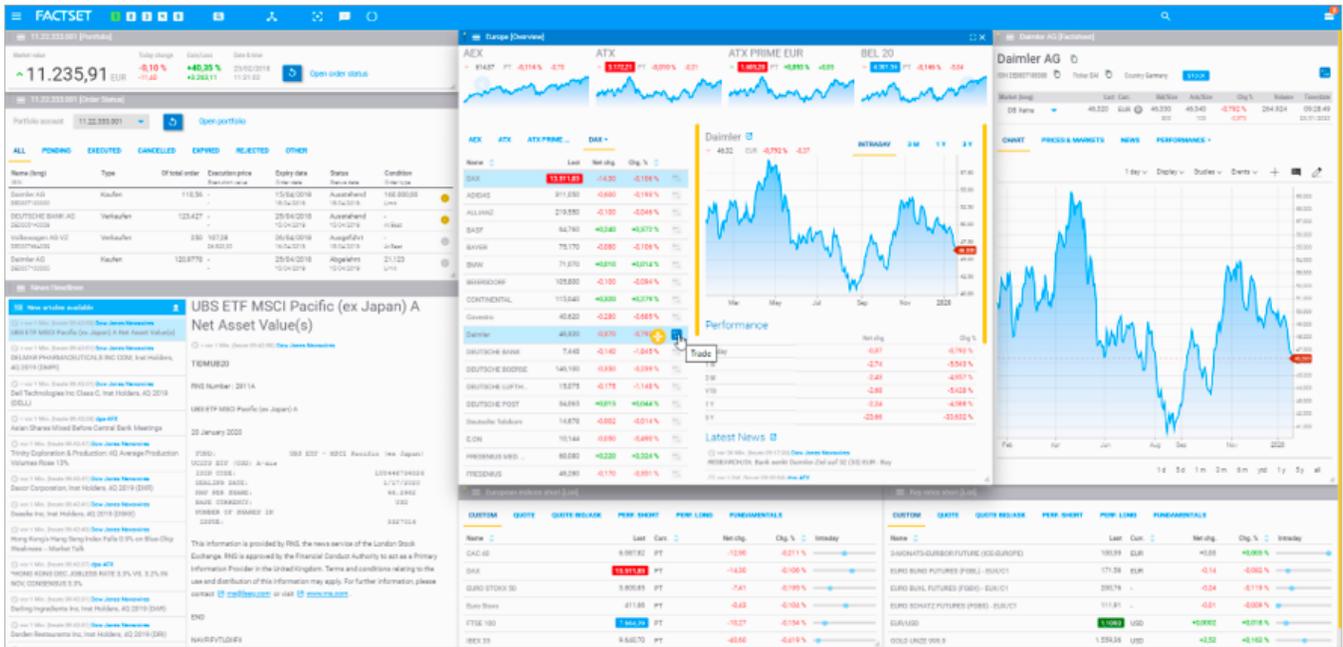


# Digital Solutions for Wealth

Combine proprietary client information, unique content, and award-winning technology to deliver tailored web portals and applications that meet client needs while increasing advisor impact.



## ADVANCE YOUR FIRM'S DIGITAL TRANSFORMATION

Partner with FactSet to present a sophisticated digital solution to your clients, no matter your firm's digital capabilities and resources. Leverage our decades of financial market experience to build an effective digital experience and choose from an array of digital solutions, ranging from comprehensive market data and flexible report components to custom web portal implementations.

Eliminate your firm's reliance on multiple data vendors and access FactSet's high-quality content and powerful technology. As you execute on your new digital vision, rely on FactSet's expertise and market-leading support to develop your digital strategy and navigate the implementation process.

## DRIVE INBOUND CLIENT ENGAGEMENT

Combine institutional-grade content and portfolio analytics with digital technology to give your clients a tailored, in-depth view of their investments. Satisfy your clients' needs with timely portfolio insights and deliver detailed holdings and performance information for their portfolios to drive engagement.

Connect with clients where, when, and how they want as your firm manages and grows their assets. Enable advisors to present clients with personalized portfolio and research insight via secure online access, satisfying the high-net-worth community's growing desire for more transparency and active participation.

**POWER DEVELOPMENT OF YOUR WEALTH MANAGEMENT SOLUTIONS**

Augment your existing internal and external digital infrastructure with FactSet’s standardized APIs, ready-made modular components, and widgets. Leverage FactSet’s suite of APIs to enrich your existing applications, combining FactSet’s extensive library of financial content with your firm’s proprietary data. Integrate FactSet’s unique content and dynamic reports into your internal wealth portal alongside your portfolio management and trading applications for an optimal user experience. Frame individual web components into your existing intranet where they communicate seamlessly with your native intranet displays. Create a custom digital experience for your firm by integrating FactSet’s ready-made modular widgets in your online applications.

**ANSWER YOUR CLIENTS’ NEED FOR RESPONSIBLE INVESTING TOOLS & INFORMATION**

Address the growing demand from your clients to create a digital experience that surfaces tailored insights to their own environmental, social, and governance (ESG) investment goals. Empower your clients with the data, news, and research they need to better evaluate the implications of global events for their portfolios. Increase trust and transparency by providing clients with the tools that will allow them to better understand the investment process used to screen and select securities for their portfolio. Present your clients with the advanced data and analytics they require to ensure that their investments align with their values. Give clients the ability to set their own parameters and perform a deep dive into real-time signals and data from Truvalue Labs, a FactSet company.

**GAIN A CUSTOM SOLUTION DESIGNED FOR YOUR FIRM**

Trust FactSet to help you define, develop, and operate your digital solution. Achieve high-quality results while saving on infrastructure investments and operational expenses by allowing our team to build efficient strategies and solutions for your business.

