WEALTH MANAGEMENT
Enhance market insights with customizable financial information systems
Enhance market insight with customizable financial information systems

Interactive Data’s Wealth Management solutions provide wealth managers and financial advisors with efficient and flexible workflow-supporting tools designed to professionally support their mass affluent and high net worth clients. Media portals can offer sophisticated high-level information services to their audiences.

**Customizable solutions:** Develop a tailored Wealth Management solution that fits your business

**Give meaning to financial information:** Benefit from individual visualization by presenting large amounts of data in the relevant context

**Total cost of ownership:** Reduce costs for development, content, ongoing support and maintenance

**Via multiple channels:** Offer financial information to users on the move across a range of channels, including mobile solutions and social network applications
A financial desktop solution designed to help with efficient advisory processes and informed investment decisions

PrimeTerminal is the customizable Java-based financial desktop solution for use by wealth managers and financial advisors in private banking and asset management. With its flexible access to a universe of global content and intuitive functionality, it can support advisors in their daily workflows, e.g. by providing their clients with well-informed advice and a high level of service.

**Global content universe:** Access global real-time and historical data, analytics, fundamentals, research data and news, as well as fixed income evaluated pricing, securities pricing and reference data for more than 10 million instruments globally, supported by sophisticated searching capabilities

**Customizable desktop solution:** Tailor the desktop to fit your content and functionality requirements, and easily manage watchlists, portfolios or other windows via an intuitive, user-friendly interface

**Total cost of ownership:** Reduce your total cost of ownership with no additional on-site technical infrastructure requirements, low maintenance, customized user settings, screens and centrally stored security lists, and flexible access via Web Start

**In-house information:** Proprietary content such as internal quotes, analysis or recommendations can be easily integrated

**Mobile access:** Access your personal desktop via mobile devices and keep updated when on the move

PrimeTerminal can assist in quickly reacting to market movements, while managing watchlists, portfolios or other windows.
A customized web solution from Interactive Data for both Internet and Intranet can assist financial firms and media portals in providing their audiences with a comprehensive offering that combines relevant market information based on their individual needs. Applications can be built by selecting from various modules.

**Give meaning to financial information:** Financial market information systems for wealth management purposes are more than market data: User-friendly visualization helps to give meaning to financial data by presenting even large amounts of information in the relevant context and supporting the user in keeping an overview on market developments.

**High levels of customization:** Designs of user interfaces, the choice of data provided and the integration into existing system architectures are driven by individual client requirements

**Wide range of modules:** Asset class-specific securities suites (equities, bonds, funds, retail derivatives, options & futures, as well as commodities) are available, as well as portfolio for sophisticated analysis and alerting functions for monitoring purposes.

**Seamless integration of in-house information:** Financial firms can integrate in-house information such as reports, research results and recommendations via the Contribution Suite service. When combined with market information this can be easily made available to users via their respective systems.

**PrimePortal solutions can be customized to support clients’ individual requirements.**
Mobile and tablet applications provide anywhere, anytime access

SUPPORT INFORMED DECISIONS WHILE ON THE MOVE

We provide a broad range of mobile and tablet applications which can stand alone, or be seamlessly integrated into existing environments. Enable your advisors and customers to access critical financial information anywhere and anytime through various channels – from multiple mobile devices to social network applications and web portals.

EFFICIENTLY CREATE AND EXPAND MARKET DATA APPLICATIONS

Through Interactive Data’s PrimeDeveloper offering, financial institutions can access Interactive Data’s powerful market data platform through a variety of application programming interfaces (API), including XML, PHP, .NET, Java and JavaScript. In-house developers and developing partners can gain access to comprehensive market information, as well as analytical and search tools, and can seamlessly integrate them into their applications and platforms.

DEFINE – DEVELOP – OPERATE: CUSTOMIZED WEB SOLUTIONS

Interactive Data’s customized web solutions are based on our “Define – Develop – Operate” model. We offer assistance at each stage of the process of building a customized wealth management solution, as well as operating and maintaining financial information systems.

Clients can benefit from our consulting and market knowledge, as well as from our development and maintenance services, which can help to reduce infrastructure and operating costs.

- Define
  Close consultation with the client, technical advice on workflows and data integration

- Develop
  Development of customized applications, adaptation to individual IT infrastructure requirements, and integration into specific CRM systems or portfolio management applications

- Operate
  Hosting of clients’ financial information systems in Interactive Data’s computer centers, maintenance and continuous enhancements based on client and market requirements
ABOUT INTERACTIVE DATA

Interactive Data Corporation is a trusted leader in financial information. Thousands of financial institutions and active traders, as well as hundreds of software and service providers, subscribe to our fixed income evaluations, reference data, real-time market data, trading infrastructure services, fixed income analytics, desktop solutions and web-based solutions. Interactive Data’s offerings support clients around the world with mission-critical functions, including portfolio valuation, regulatory compliance, risk management, electronic trading and wealth management. Interactive Data is headquartered in Bedford, Massachusetts and has over 2,500 employees in offices worldwide.

For more information, please visit www.interactivelydata.com or email info-eu@interactivelydata.com

LIMITATIONS

This document is provided for informational purposes only. The information contained in this document is subject to change without notice and does not constitute any form of warranty, representation, or undertaking. Nothing herein should in any way be deemed to alter the legal rights and obligations contained in agreements between Interactive Data Real-Time Services and its affiliates (collectively, “Interactive Data”) and their clients relating to any of the products or services described herein.

Interactive Data makes no warranties whatsoever, either express or implied, as to merchantability, fitness for a particular purpose, or any other matter. Without limiting the foregoing, Interactive Data makes no representation or warranty that any data or information supplied to or by it are complete or free from errors, omissions, or defects.

Interactive Data® and the Interactive Data logo are service marks of Interactive Data Corporation. Other products, services, or company names mentioned herein are the property of, and may be the service mark or trademark of, their respective owners.

©2012 Interactive Data