



FINCAST

THE FUTURE OF FINANCIAL ADVICE

FINCAST is transforming the wealth management industry. FINCAST's technology gives financial advisers real time portfolio management and goal based advisory tools, enabling them to deliver better advice to more clients.

FINCAST's framework uses adaptive advice algorithms to ensure advisers are consistently providing tailored advice based on the latest research, delivering increased client engagement, enhanced efficiency and reduced compliance risks.



Utilise the latest research to deliver market relevant advice to more clients



Enhance engagement with clients by using our algorithms to automatically generate interactive charts and graphs



Scale your business



Digital data capture facilitates deeper insights into your clients and their buying behaviour



Reduce compliance risk



PORTFOLIO CONSTRUCTION APPLICATION

- ✓ Design, build and manage your own tailored portfolios, utilising institutional grade forecasts and optimisation algorithms that adapt based on market conditions.
- ✓ Make more informed decisions and gain deeper and broader insights into your portfolios.
- ✓ Show more sophisticated clients how you manage portfolios to help them truly appreciate the benefits of your advice.



ADVISER APPLICATION

- ✓ Our goal based advice framework improves client engagement and increases efficiencies. Using our technology, financial advisers can see more clients and increase sales.
- ✓ Seamlessly guide clients through the fact finding, risk profiling, asset allocation and portfolio tailoring process, using our interactive application.
- ✓ Provide clients with a visual, holistic perspective of their assets.
- ✓ Take clients through recommended strategies using charts and graphs that are automatically created.
- ✓ Manipulate variables on screen and discuss the results with your client in 'real time'.
- ✓ Can be used with a client (face-to-face) or remotely (via a web meeting).



AUTOMATED ADVICE APPLICATION

- ✓ Expand your client base with your own customised Automated Advice application.
- ✓ Clients answer simple questions on their objectives and risk profile that enable our algorithms to guide them to an appropriate strategy, delivering valuable advice at a lower cost.
- ✓ They can then implement the strategy and receive ongoing guidance from you on managing their assets.

OUR CLIENTS INCLUDE:

WEALTH
MANAGEMENT
GROUPS

FINANCIAL
INSTITUTIONS

INDEPENDENT
FINANCIAL
ADVISERS AND
INSURANCE
GROUPS



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