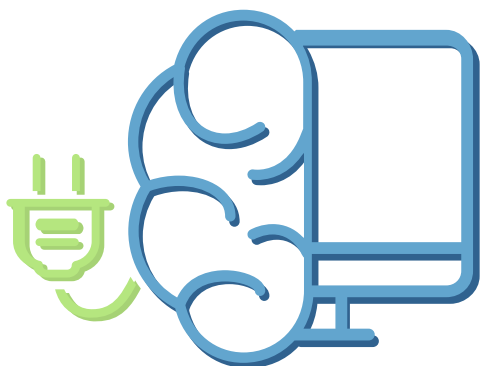




INTELLIGENT MACHINE FOR FINANCIAL ADVISORS



Introducing RAGE-AI™



With RAGE-AI™ they **reduced operating costs by over 50%**, from \$15M to \$7M.

Business Problem

- Most UHNW and institutional clients held assets with multiple custodians.
- Aggregation of assets and performance across custodians was manual, error prone and slow.
- Significant compliance exposure as Financial Advisors devised ad hoc solutions.

Solution

- Intelligent Machine that automatically aggregates and normalizes assets held at any custodian; processing process paper statements as well.
- Built in machine learning, both autonomous and assisted.
- Enable rapid addition of new custodians and formats with little or no effort; addition of new asset classes easily handled; Active Agent to monitor fund managers continuously.

Benefits

- Reduced operating costs by over 50%, from \$15M to \$7M.
- Improved client satisfaction dramatically by offering same-day or near real-time asset aggregation and analytics capabilities.
- Created consistent analysis of performance and improved regulatory compliance; achieved continuous risk assessment.