



Online Portfolio Services Coric Web Reporter

On-demand, cost-effective reporting for environmentally conscious or mobile clients

Effective client communication has never been more important to investment managers, who must navigate volatile financial markets while delivering comprehensive data, analysis and advice. When real-time, online access to valuations and portfolio information is provided clients can monitor investment performance whenever they choose, which goes a long way towards easing client uncertainty.

Clients of institutional asset managers and private wealth firms also have increasingly diverse delivery preferences. Some see no need for change; others are frustrated with traditional paper-based methods of client report distribution.

Whether this frustration stems from a thirst for more regular updates, a desire to reduce environmental impact, the meteoric rise in mobile device usage or, in the case of independent financial advisors, the sheer practicality of receiving hundreds of large mail items every reporting cycle, the investment management industry is experiencing a significant rise in demand for web-based delivery of investment reports and other client communications.

Coric Web Reporter is a secure web portal for reporting client data and documents online, without compromising the accuracy of data and quality of presentation.



Benefits of Web-based Reporting

Significant reduction in costs

Increased customer satisfaction doesn't necessarily increase costs. Every time a client elects to view financial information exclusively online, you save money. Your spending on paper, print and mailing are dramatically reduced.

Reduced carbon footprint

Online access to all current and historical reports means clients can recycle – or eliminate – paper-based reports and valuations. Some clients prefer 100% paper-free reporting; others like to receive a paper-based report but appreciate online access to historical reports so they can save on storage over the long term. Either way, online access is the responsible environmental choice for many clients and their investors.

Online access for forward-thinking clients

Coric Web Reporter enables institutional asset managers and private wealth management firms to offer a choice of delivery mechanism to all of their clients. For those who prefer online communications, Coric Web Reporter provides secure, on-demand access to highly tailored reports, anytime from anywhere.

Next generation client service

Online portfolio services reduce dependency on the client services team to deliver up-to date information on investment performance. With instant, on-demand access to all financial reports, both current and historical, clients are no longer tied to a pre-determined report delivery schedule. They can view financial information whenever they choose, from their desktop, laptop, tablet PC, smart phone or other mobile device.

Branded web sites for third parties

Equipos can provide value-added branded web sites for a variety of organizations, including clients of third party administrators and independent financial advisors.

Stringent security

Internet security is an increasing concern for many clients. Equipos has developed rigid access controls to safeguard the personal and financial data of each and every client. Coric's online portfolio services are protected by logins, passwords and user-managed access controls, so security is never compromised.

Case study: Rathbones Online Access for Real-Time Reporting

Coric Web Reporter currently provides over 5,000 private clients with online access to real-time reports. It also underpins four Rathbones web sites, including one IFA branded site, enabling users to retrieve more frequent, ad hoc updates via the Internet.

Data retrieved via the Internet provides a summarized valuation and cash transaction statement. Unlike hard copy reports, clients can view online updates on-demand, 24/7 from any location, enabling instant progress tracking. Online portfolio access also allows IFAs to provide rapid responses to clients and carry out wealth reviews simply and quickly.

The range of documents available online initially includes PDF copies of valuations and tax packs. This development has been welcomed by intermediaries, who typically receive 500 or more valuation packs into their mailroom each reporting cycle. Those who select the paper-free option will be able to access these packs instantly, online, saving both time and storage space.

Want to learn more?

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