NEWS

For Immediate Release

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Kwanti Introduces Risk Profiling and PDF Statement Extraction to Portfolio Analytics Platform

Award winning portfolio analysis solution adds impactful new features for financial advisors

SAN FRANCISCO, CA (November 12, 2024) – Kwanti, a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently announced two new enhancements to their platform: Risk Profiling, which enables advisors to send risk profiling questionnaires, compare client risk profiles with portfolio risk scores, and generate personalized investment policy statements, as well as xPDF, a document extraction feature that allows advisors to effortlessly upload PDF statements directly into Kwanti, which automatically extracts position details and creates a portfolio for efficient analysis, saving users countless hours.

"We've been Beta testing these game-changing features for quite a while now," said Christophe Gauthron, CFA®, Founder and CEO of Kwanti. "Both are significant additions to our platform from a personalization and efficiency standpoint and allow advisors to create so much additional value for clients and prospects."

Risk Profiling is a set of new features designed to enhance the way advisors manage client risk, starting with the introduction of a dedicated Client section in Kwanti. A Client in Kwanti is designed to help advisors better organize their clients' data, making it easy to manage everything from risk assessments to portfolio reviews. Each Client acts as a hub for managing questionnaires, portfolios, and more, ensuring that client-specific data is organized and accessible.

With the Risk Questionnaire feature, advisors can easily send out customizable risk profiling questionnaires to prospective, new, or existing clients. The questionnaires are fully customizable to address the needs of RIAs and broker-dealers with specific compliance requirements. These questionnaires capture each client's financial goals, risk preferences, and investment horizon.

Once completed, responses are saved to their profile, providing a clear risk picture for aligning their portfolio with suitable models.

Kwanti's Risk Profiling quantifies portfolio risk with a Risk Score, allowing advisors to easily compare a client's risk tolerance with their current or proposed portfolio. This side-by-side view quickly identifies mismatches, supporting informed adjustments for better client alignment.

After aligning a client's risk profile with their portfolio, advisors can generate a detailed Investment Policy Statement (IPS) within Kwanti. This IPS captures risk preferences, recommended portfolio adjustments, and a tailored investment strategy, providing a clear roadmap for both client and advisor.

"With these enhancements, Kwanti continues to prioritize usability," added Gauthron. "Like every other Kwanti feature, Risk Profiling is designed with the advisor's workflow in mind, helping them seamlessly integrate client risk assessments, portfolio comparisons, and personalized recommendations into their practice. We're committed to providing tools that help advisors serve clients effectively and with ease."

To learn more about all of the different elements of Kwanti's Risk Profiling and watch a video demo, please click here.

XPDF INTRODUCED TO SIMPLIFY PORTFOLIO ANALYSIS WITH PROSPECTS

With Kwanti's new xPDF feature, advisors can upload a client or prospect's PDF statement and instantly extract position details into a portfolio. This automation removes the need for manual data entry, reducing errors and saving valuable time. Within minutes, advisors can analyze the portfolio and quickly move to Kwanti's proposal generation tool to showcase improvements and demonstrate value to prospects.

This add-on feature streamlines portfolio analysis to help advisors save time and win business. Simply log in to the platform, navigate to the import menu, and select PDF.

To learn more about xPDF, please click here. Kwanti users that are interested in enabling this feature for their account can email Support@Kwanti.com.

ONGOING ENHANCEMENTS TO INTRODUCE EFFICIENCIES FOR ADVISORS

Kwanti's industry-leading portfolio analytics solution – which was recently named the winner of the Portfolio Analytics award in the *WealthManagement.com* 2024 Industry Awards, as well as a finalist in the *ThinkAdvisor* 2024 Luminaries Awards for Innovation in Investment Management – aids financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources.

These two new features introduce even more efficiencies for advisors and come on the heels of multiple other enhancements made to the platform in the last year:

- New integrations with Betterment for Advisors and Altruist were introduced, as well as an enhanced integration with Advyzon.
- The Model Marketplace was expanded with 11 new models from BlackRock (BlackRock Global Allocation models) and 5 new models from WisdomTree. Kwanti's Model Marketplace now boasts 105 diverse models from top providers.
- The Custom Text Page feature was introduced, allowing greater flexibility and customization in generating and adding custom pages to PDF reports.
- CIT data (Collective Investment Trusts) was added to the platform and provided to users, allowing advisors to provide more accurate and comprehensive investment advice with these increasingly popular investment options among institutional investors and retirement plan sponsors.
- The list of available indexes within Kwanti was expanded by adding The Morningstar Target Risk Index family.

In addition, in an effort to highlight features that may not be obvious to certain users and to help maximize usage of the platform, earlier this year Kwanti introduced KwanTIP videos, a series of short, informative videos showcasing features and providing tips on using Kwanti to the fullest.

"We've been around for 17 years and we've done zero training hours – not that we don't offer, it's that people don't ask," said Patric Glassell, Head of Sales at Kwanti. "Nevertheless, we wanted to create these helpful videos so our users can get the most out of Kwanti and take advantage of sometimes underutilized features."

To watch all of the KwanTIP videos, please click here. To learn more about all of the latest developments at Kwanti, please click here.

ABOUT KWANTI

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