



# Technology

For professional adviser use only

## Your Challenge

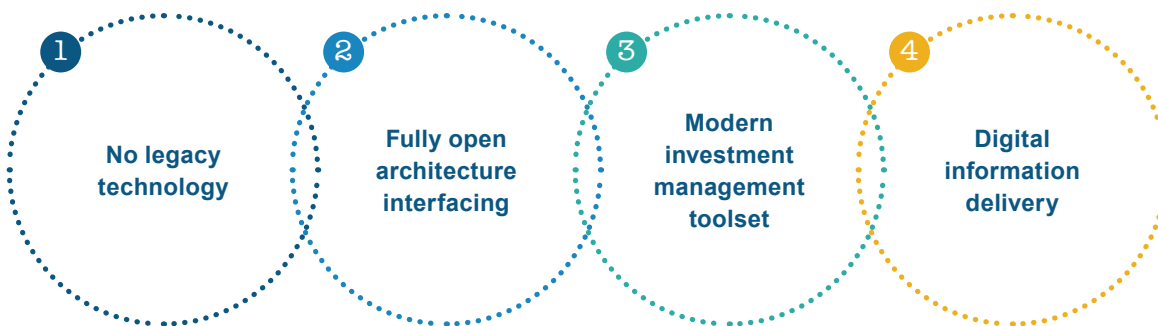
You require modern portfolio and order management tools to efficiently run your business. You need to have information from your internal systems integrated into the platform you operate with, and you need to pull in further critical data from third party product and service providers that hold assets for your customers. You also need to cleverly and efficiently deliver information and reporting to your team and to your customers. Your own IT resource has a limited skillset and is focused on maintaining your internal infrastructure.

## Our Advanced Answer

Multrees is committed to maintaining a best of breed IT architecture that will keep our business and yours ahead of the technology curve. Through Multrees Compass you have access to optionally available investment management tools which are fully integrated into our modern agile technology stack.

Our state of the art messaging layer combined with our strong skillset in integration and interfacing will enable you to utilise your own retained technology, such as CRM and performance databases, while data from external third parties can be efficiently imported onto the platform. All these tools, and your required internal and customer reporting can optionally be delivered via your own branded digital delivery platform, supported by Multrees technology.

## Key benefits for you and your customers



## About Multrees

Multrees is an independent provider of global custody, investment administration and consolidated reporting services to wealth managers and private investment offices. We work with you to provide customised solutions that help you to differentiate your business and customer propositions.

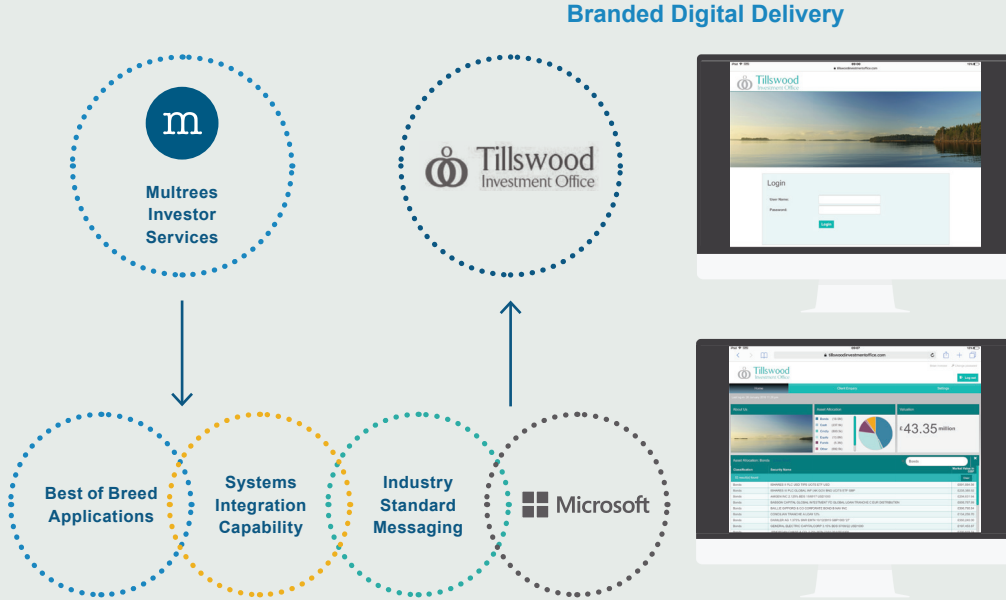
Our specialist operational teams have a wealth of experience acquired across the financial services industry to seamlessly integrate our custody, consolidated reporting and investment administration services.

### Client and business reporting solutions

We work with you to provide customised open architecture business support solutions that help you to differentiate your businesses and propositions.



## Integration Interface



## Investment Toolset



For further information about our business support solutions please contact your usual relationship manager at Multrees. Alternatively, you can contact us on 0131 247 5000 or by email at [info@multrees.com](mailto:info@multrees.com)

Multrees Investor Services Ltd is authorised and regulated by the Financial Conduct Authority (FCA).