

Client Case Study

Major Spanish High-End Family Office chooses Finvent

CLIENT BENEFITS

Significant speed and ease of use
System stability and performance
Enhanced reporting capabilities
Reliable long-term partner

Efficient portfolio management has been the heart of the Finvent Investment Platform throughout the past decade. Many clients have been using Advent Office®, the complete, modular, best of breed portfolio management solution, efficient and effectively. Among others, one of the leading family offices in Spain with great experience in advisory services has been using Advent Office for over four years.

Choosing Finvent

For this particular client, the acquisition of a solution that would cover its reporting and portfolio management needs was of extreme importance. Finvent offered a reliable, trusted, internationally proven solution that met the company's requirements.

The project

Having selected Finvent, targets and requirements were clear for both sides. The client was in need of a system that would automate certain areas of reporting and portfolio evaluation. Finvent completed this project on time and on budget, providing its customer with a complete financial and technical solution, fully embedded in its daily portfolio management process.

Significant speed and ease of use

With the Finvent Investment Platform's (FIP) straight through process automation, this client has achieved great efficiency. The platform's excellent architecture offers an impressive ease of

use. In addition, employee performance has risen, since portfolio managers are now able to spend less time on administration and focus on their clients' needs.

System stability and performance

With portfolio managers spending less time on administration, FIP has also achieved to significantly reduce human errors and manual processes. The solution is widely known for its remarkable stability in keeping the daily business on-line at all times. In addition, its enhanced scalability allows users to perform multiple and heavy tasks in very short response.

Enhanced reporting capabilities

Having a broad array of standard and easily customizable sophisticated reports, FIP gives the customer the ability to achieve automation through reliable and accurate reporting capabilities, in order to better communicate with its clients and company management. Custom reports can also be easily created without the assistance of IT involvement, thus reducing costs and time required to complete and send report packages, while increasing client satisfaction.

Reliable long-term partner

Apart from a trusted and flexible platform, Finvent also offers its client high-quality technical support and consulting services. Even after completing the implementation cycle, Finvent continues to provide timely and steady support. Finvent's certified consultants, through their know-how and expertise, assisted this organization in optimizing its business flow, thus establishing a long-term relationship.

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