

Evaluate your financial life.

1. Do you feel confident that your investment records are accurate, complete and reflect true status of your family's portfolio across all asset classes and entities?
 - Yes
 - No
 - Maybe
2. Are you reviewing annualized returns (IRR) including capital gains/losses, dividends, interest, expenses and income across all assets?
 - Yes
 - No
 - Don't Know
3. Can you easily compare real performance (IRR and Absolute Returns) of all your advisors and self-managed portfolios?
 - Yes
 - No
 - Don't Know
4. When was the last time you reviewed your asset allocation & rebalanced your family's portfolio to align with stated goals?
 - Last 30 Days
 - Last 60 Days
 - More Than 2 Months Ago
5. How long do you have to wait before you receive insightful reports you may have asked for?
 - Few Minutes
 - Few Hours
 - One Day or More
6. Would you like to have easy, real time and secure access to investment performance, records and financial statements, including on your mobile device?
 - Yes
 - No
 - Not Needed

With super powerful yet affordable technology, we aim to empower wealth owners with insightful analytics on their fingertips thereby enabling better control to make well informed decisions.

To request a demo of Asset Vantage:

Visit us at www.assetvantage.com

Email us at enquiry@assetvantage.com