



# You are now free to move about your business

## CHECK YOUR SYSTEMS

To grow your business, you need a comprehensive investment platform – with freedom to manage portfolio and trading strategies across asset classes, custodians and counterparties with clarity before, during and after the trade. You need a partner who positions you for growth and stability.

- Does your system save you time and allow you to spend more time with clients?
- Is your platform capable and smart with all asset classes and custodians?
- Can you manage and trade models and positions with all custodians simultaneously?
- Is your system flexible and powerful enough for you meet your portfolio and trading fiduciary guidelines?
- Do you have the flexibility to control your platform with both GUIs and APIs?

## BROADEN YOUR HORIZONS

You're number one for takeoff and the runway is clear.

Co-Pilot offers a smart, scalable, multi-asset portfolio and order management platform that supports you before, during and after the trade. Our web-based platform streamlines system set-up and gives you the tools to:

- Construct multi-asset portfolios and models supported by drift analysis, rebalancing and portfolio trading
- Manage orders across equities, options, futures and fixed income
- Coordinate compliance management across the investment lifecycle with monitoring pre-trade, post-trade and at end-of-day
- Directly connect you to all of your custodians and brokers for account and position data, order execution and post-trade processing via the Co-Pilot API

## ELEVATE YOUR PERSPECTIVE

Co-Pilot lets you see clearly across your models, trades, sleeves, portfolios and households -- in the aggregate and drill down to specific positions, custodians and brokers. It provides you the freedom to invest the way you want.

Hosted, web-based and broker neutral application, Co-Pilot is fast to connect and always up-to-date. With intelligence, flexibility and global connectivity, Co-Pilot is the navigational partner you need.

Purpose-built and continually evolving to stay ahead of the curve, Co-Pilot lets you focus on your clients and where you're going, so you can move about your business with confidence. Roger that!.

## KEY FEATURES

- Multi-asset support – equities, ETFs, mutual funds, options, futures and bonds
- Manage complex asset allocation and portfolio strategies with model of models capabilities
- Build customized portfolio & trade compliance rules
- Quickly build ad-hoc positions and deploy investable cash
- Portfolio modeling tool to quickly build ad-hoc positions and deploy cash
- Real-time insight into positions and transactions with market data integration
- Built-in support for order blocking, trade aways, broker algorithms, trade rotation, and electronic routing
- Built-in support for order blocking, trade aways and trade rotation
- Agile, automated allocation management with pre- and post-trade algorithms
- Extensive API support: FIX, API, file-based and data exporting

*The next generation multi-asset portfolio trading platform for the alpha-driven wealth manager.*