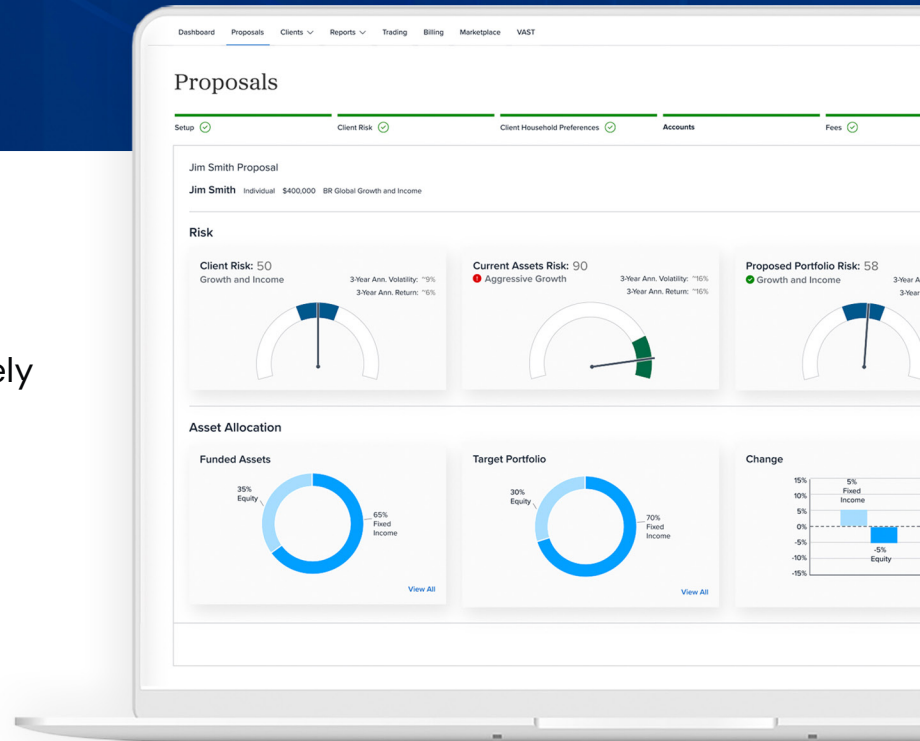


Proposal Generation

Simplify & Streamline Your
Asset-Gathering Process



Drive new asset growth and showcase your value more effectively with Vestmark's intuitive, highly customizable proposal generation system, a fully integrated part of the Vestmark Advisor Suite. Using the new tool, you can create eye-catching branded proposals in a matter of minutes.



Why Vestmark Proposal Generation?

- ✓ Simplify the proposal generation process with an intuitive interface and step-by-step guidance.
- ✓ Get a holistic view of clients' portfolios by running multi-account proposals in minutes.
- ✓ Create a cohesive brand experience with customizable white label capabilities including colors and logos.
- ✓ Filter investment vehicles and products by risk to develop proposals that align with clients' risk tolerance.

Take Advantage of Proposal Generation Right from the Vestmark Platform

Vestmark's Proposal Generation system is integrated with Vestmark's portfolio trading and construction engine. Get up and running quickly with a turnkey workflow from investor profile to account opening to ongoing portfolio management.



How it Works: Generate Custom Proposals in a Few Simple Steps

1. Risk Tolerance

Specify client risk tolerance to inform which products can be added to portfolios.

2. Portfolio Builder

Specify multiple proposed accounts in a single proposal. You can also include new and existing accounts within the same proposal.

3. Product Selection

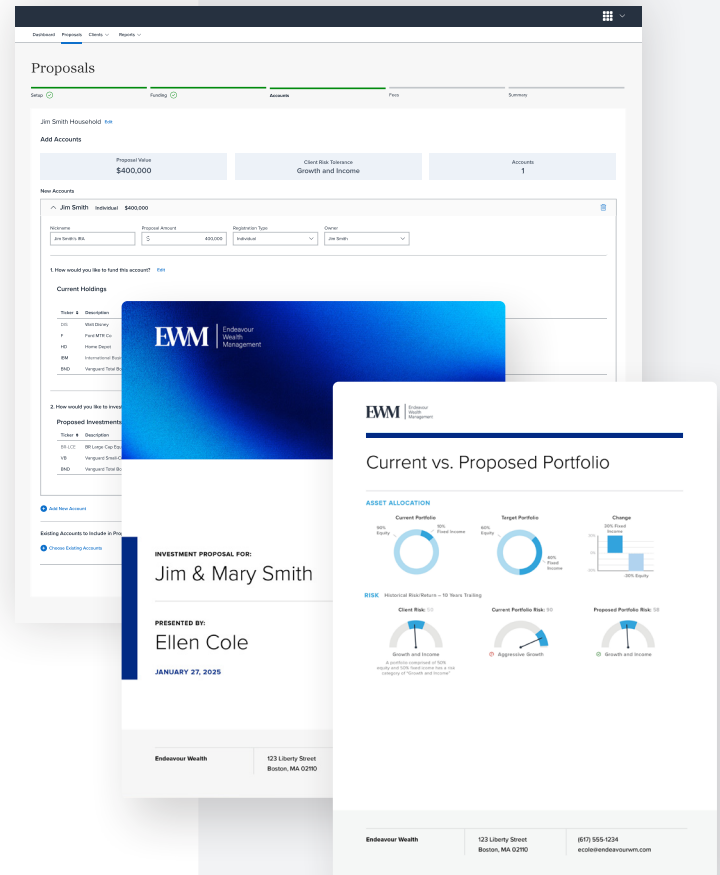
Choose from predefined products or search for a custom allocation by risk, asset class, and performance statistics.

4. Proposal Customization

Generate proposals branded to your firm's specifications and include only the content you want to share with your clients.

5. Portfolio Suitability

Easily manage portfolio suitability with automated alerts that indicate whether a proposed portfolio is not aligned with a specified client risk tolerance.



Get a closer look
at Vestmark Proposal
Generation.

Ready to get started? Talk to your
dedicated relationship manager.

vestmark.com →

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