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Wealth Reporting and Insights: Report Designer

AN IMPROVED WAY TO CREATE CLIENT REPORTS FOR A MORE PERSONALIZED EXPERIENCE

Have you ever run into a situation where you wanted to modify a standard report template for a client meeting? Or even create a personalized report from scratch? With report designer, a new enhancement available on Wealth Reporting and Insights, you now have added flexibility to generate customized reports to support the dynamic needs of your clients.

Along with our extensive catalog of pre-defined reports, advisors can build an entirely new report using data elements from the library, or modify a standard report template by simply editing individual sections. Drag and drop capabilities make the process simple to use. New design features put you in the driver's seat for how you want your report to be presented to clients.

WHY REPORT DESIGNER?

Greater Flexibility. More reporting options than ever before. Advisors can start with a blank canvas, select between various chart types and font sizes, choose the layout for their report, and sort the data elements they would like to incorporate into their own design.

Ease of Use. An interactive and user-friendly interface allows advisors to organize reports to specific client needs. Before finishing a new report, advisors can preview the design to make sure it's presented the way they want. To save time, reports can be previewed for accuracy and saved and organized in one central location for future use.

Better Experience. It is no secret that clients today each have their own preferences. Report designer allows advisors to configure unique reports to help meet those preferences that a client may have.

HOW TO GET STARTED?

Once a firm has set up the proper entitlements, report designer can be found in just a few clicks from the main menu of Wealth Reporting and Insights. Navigate to Reports > Client Reports > Report Designer. Then follow the prompts to view custom reports and get started.

WHAT IS REPORT DESIGNER?

Available through Wealth Reporting and Insights, report designer lets advisors generate custom reports, modify a standard report template and take more control over the design and layout to support client needs

KEY FEATURES:

- Create new reports from scratch
- Modify a standard report template
- Preview customization
- Home office privileges for oversight on advisor access and reporting components

MORE INFORMATION?

To learn more about how Wealth Reporting and Insights can create an improved reporting experience, contact your Albridge product consultant for more information

albridge.com

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