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# CROESUS DATA ANALYTICS

Develop practice management strategies based on  
data-driven insights



# Built for practice management

Understanding an advisor's data has never been simpler. **Croesus Data Analytics** allows practice management specialists to provide wealth management professionals with actionable insights into their business using a sophisticated data-mining tool. This data-rich analytics solution allows both managers and trainers to focus on building coaching programs based on business intelligence.

Croesus Data Analytics provides all the resources needed for practice managers to help define, articulate, and quantify an advisor's value and growth potential. In one single platform, managers can assess the advisor's book of business, set goals for improvement, and translate these goals into concrete strategies with measurable results.

Whether you are working on a fee-based transition model or looking at asset inventory, with Croesus Data Analytics you can filter, sort, and compare large volumes of financial and non-financial data quickly. By leveraging the flexibility of this tool, practice management teams will be empowered to provide advisors with the business opportunities that drive growth.

# Key features

Holistic view of the book health

Account-type breakdown

Product and book inventory details

Revenue sources

Assets under management (AUM) breakdown

Client relationship management (CRM) data points



## Enhance your value proposition with data

Engage in meaningful conversations with advisors by highlighting trends and opportunities using Croesus Data Analytics. Data can be mined on the fly, providing practice managers with the data to articulate and align their value proposition with the advisor's reality. Practice managers can quickly drill down into book data using a multitude of variables including client segments, demographics, and securities. In addition, an instant view of the top-performing segments highlights clients that deliver the most potential.

## Manage transition programs

Questions about your business? Croesus Data Analytics is the key to providing answers and insights. "Where is revenue generated? Transactions? Management fees?" "Is your revenue one-time or recurring?" "How many of your clients have registered retirement accounts? Tax-free savings accounts? Registered education accounts?" Data analysis can be made per branch, advisor, client, age group, or account type. Croesus Data Analytics can then facilitate the creation of targeted programs to improve your book of business.

## Identify opportunities

Croesus Data Analytics provides insights and invaluable business intelligence. The ability to determine what the advisor's products inventory looks like today enables practice managers to understand where the book's potential lies. Key metrics such as the fragmented securities ratio and position count, offer a baseline onto which practice managers can build a product substitution strategy and ultimately start generating organic growth for advisors and their firms.



## About Croesus

Since 1987, Croesus has been providing sophisticated wealth management solutions to financial institutions throughout North America. Currently, 14,000 investment professionals use Croesus solutions to manage over \$1 trillion in assets. With its 180 dedicated employees, Croesus has built a reputation on the ability to efficiently transform data into information, develop portfolio management solutions to drive efficiency and deliver business intelligence for fact-based decision-making.



[www.croesus.com](http://www.croesus.com)