
CROESUS INVESTOR

Tracking investment growth



The investor portal, an online solution designed to support the incomparable Croesus Advisor portfolio management software, provides investors with easy and secure access to their portfolio.

User-friendly and dynamic, the Croesus Investor client portal facilitates searches and ensures deeper understanding for its users. Advisors can then focus on what matters most for the growth of their business.

Improve the client experience

- ☑ Allow your clients to view their investments and transactions online.
- ☑ Share documents, including account statements, prospectuses, and market research quickly and securely with your clients.

Designed for your clients' success

- ☑ Provides access to information on accounts, securities held, and transactions.
- ☑ Explores scenarios and analyzes impacts by creating fictitious accounts that may or may not be based on existing accounts.
- ☑ Analyzes performance using precise data calculated according to GIPS (Global Investment Professional Standards).

A flawless integration

Our Professional Services team can help you integrate Croesus Investor directly on your website.

Your company can add new features to its website or applications through our API interface. This interface ensures a transparent integration with third-party software.

Our features, accessible through the Simple Object Access Protocol, allow you to integrate portfolio data using a service-oriented architecture (SOA).

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