
CROESUS ADVISOR CO

Strengthening security and control



MODULE ENHANCEMENTS

Keep intruders away

Your data is precious, control access by enabling two-step verification*, a simple and reliable way to avoid intrusions. You can choose at what level (firm, branch, user) and how often it should be carried out.

In order to enhance security standards for all our clients, users must now have their own access, and a unique recovery email address is required for receiving security codes (if two-step verification is enabled) and resetting forgotten passwords.*

** Not valid for applications that use the single sign-on (SSO) method.*

Functional esthetics

The highly appreciated built-in reporting capabilities of Croesus Advisor have been enhanced to provide you with greater ease of use. In charts, it is now possible to automatically group classes that exceed the allowed limit into a common category, **Combined classes**. The appearance and understanding of the **Your Investment Performance** report have been improved. Several esthetic changes have been made to increase the readability of charts.

The account view of projected portfolios has been optimized to:

- Move a buy order between accounts
- Add new positions

FEATURE UPGRADES

Customized security

To limit the possibility of errors and improve user rights management, firms can now choose which users can delete relationships, based on their access level.

Managing access to configurable reports with firms is now more flexible. All configurable reports also present an option to only be visible to their owners.

In addition, inactivity time in Croesus Advisor is now managed by the firm, which helps to unify its security measures and its standards. The feature has been removed from user preferences.

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