

5 Impactful Ways Advisors Use YCHARTS

1



Present Strategies & Share Insights

- Create an engaging, personalized client experience
- Customize proposals with firm branding and disclosures
- Build and distribute presentation visuals

2



Generate New Investment Ideas

- Mutual Funds, ETFs, Stocks and SMAs
- Screen securities using custom criteria
- Create your own scoring and ranking systems

3



Build, Manage & Optimize Portfolios

- Build, track and optimize your portfolio strategies
- Measure historical allocation and holdings changes
- Test hypothetical strategies and ideas

4



Research & Compare Funds and Stocks

- Examine fund holdings and performance
- Dive deep on stocks' fundamentals
- Access analyst recommendations and price targets

5



Educate Clients & Answer Questions

- Visually explain investing concepts and current trends
- Power your blog, social media, and thought leadership
- Answer questions "on the fly"

What people are saying

"YCharts is a really elegant way to monitor our portfolios and it has demonstrated its value multiple times in helping us communicate with clients."

Burton Enright Welch / Ben Peters, a BEW financial planner & Chief Compliance Officer



"Having the power of all of the data at our fingertips in a customized format gives me a lot of flexibility to be creative with clients and highlight the important concepts to both clients and prospects."

Balasa Dinverno Foltz LLC (BDF)

