YCHARTS for
Northwestern Mutual®

Enabling smarter investment decisions & better client communications for advisors

As advisors and planners seek to differentiate themselves and effectively communicate their value proposition, creating repeatable, scalable processes for AUM growth can be a challenge. YCharts delivers by streamlining and automating investment research, creating compelling presentation materials, and helping advisors achieve more growth in less time.

> *"If you're serious about gathering assets to build out your practice, you need a tool like YCharts to educate your clients, demonstrate your value, and improve reporting on model performance"*

Chris Collins, Owner/Founder at Collins Financial

→ **Learn how YCharts can benefit you**

Ready to Learn More?

Attend a Northwestern Mutual round table session to see YCharts in action and hear from colleagues who are already using the tool.

🔍 **Learn More**

YCharts for Northwestern Mutual Advisors

- Signature Research, Off-Research & Brokerage , and Approved SMA Lists, available throughout YCharts

- Home office-approved, client-facing reports for winning new business

- NM Signature Portfolios & Custom Blended Benchmarks included

What YCharts Can Do For You

- Create compelling and visually appealing portfolio reports and side-by-side comparisons to support asset growth

- Compare your client and model portfolios against any security, portfolio, index, hypothetical strategy, or custom benchmark

- Answer client questions on the fly with dynamic charts and comparative data tables

- Foster a collaborative work environment by sharing insights, talking points, watchlists, and research with your team

- Proactively address compliance needs across your organization utilizing FINRA-reviewed reports with custom disclosures and branding

- Generate smarter investment ideas and document due diligence by screening the universe of securities or jumpstarting your research with prebuilt templates

Not already a YCharts client?

→ **Schedule a Demo**   → **Start a Free Trial**   → **Learn More**   ✉ **nm@ycharts.com**