

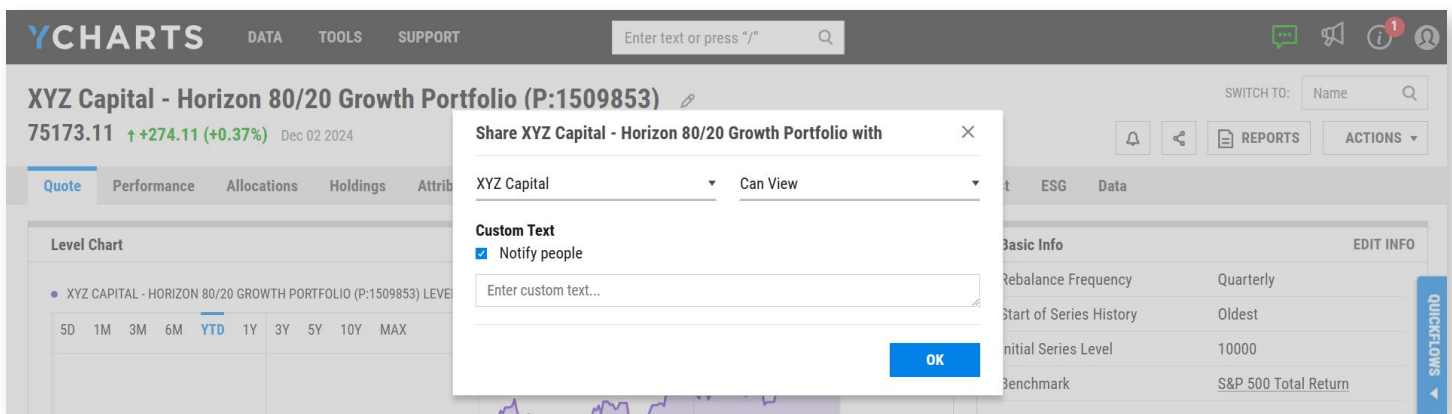
Deliver Custom Models & Solutions to Advisors on YCharts

As an OCIO, use YCharts to create and distribute firm-specific model portfolios and solutions directly to different firms within your advisory network.



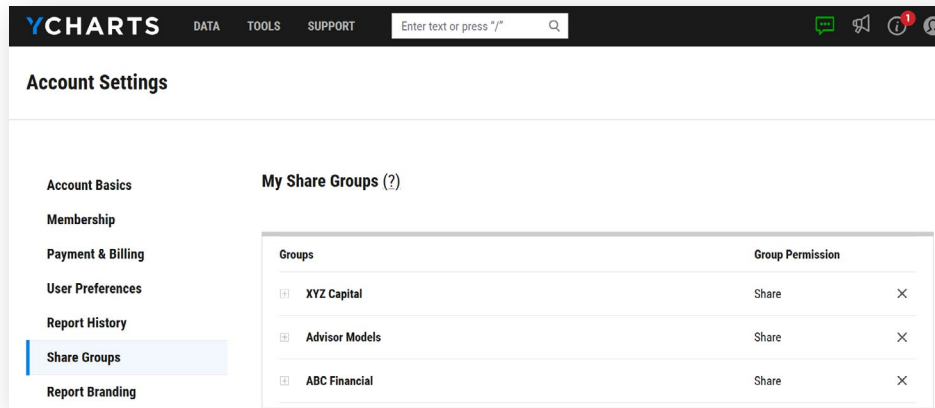
1 Tailored Portfolio Creation and Distribution

- Construct firm-specific Model Portfolios, Dashboards, and other solutions using YCharts that align with your investment philosophy and the unique needs of a firm’s clients.
- Enhance shared dashboards with Portfolio Manager notes, recent rebalancing updates, or direct links to your firm’s marketing materials and website for comprehensive advisory support.
- Share these portfolios or solutions directly within YCharts to selected advisors, ensuring each firm has access to bespoke solutions that resonate with their client’s goals.



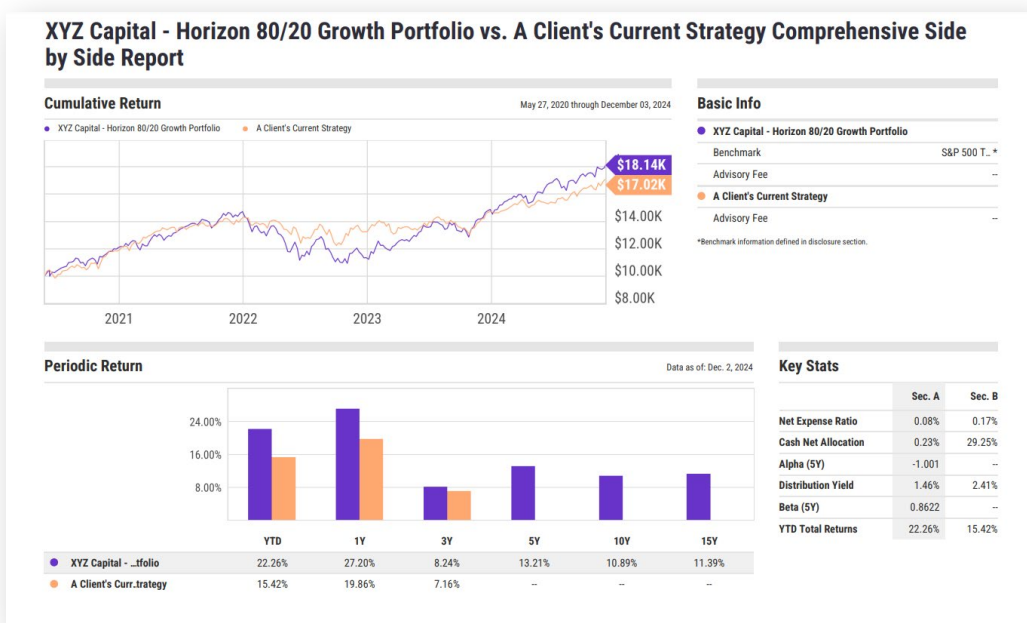
2 Precise Access Control and Enhanced Security

- Use YCharts to form groups directly, streamlining how your firm manages and shares bespoke solutions with advisors at specific Independent Broker Dealers or RIAs who already subscribe to YCharts.



3 Elevate Advisor and Client Satisfaction

- Nearly 10,000 advisors already use YCharts for research and client communications. If advisors within your network are already users, integrating your custom solutions directly into YCharts significantly enhances their existing workflow.
- By equipping advisors with tailored strategies directly within a familiar tool, you boost their capacity to meet and exceed client expectations, directly impacting client satisfaction and retention.



As an OCIO, use YCharts to enhance your management and distribution of investment strategies. Equip advisors with bespoke resources designed to elevate client outcomes.