YCHARTS

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.



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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.
- 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.
- 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.

YCHARTS DATA TOOLS SUPPORT	Enter text or press "/" Q		😡 🎲 🔉 🚎	
XYZ Capital - Horizon 80/20 Growth Por		SWITCH TO: Name Q		
75173.11 ++274.11 (+0.37%) Dec 02 2024	Share XYZ Capital - Horizon 80/20 Growth Portfolio with $ imes$	Q &	REPORTS ACTIONS -	
Quote Performance Allocations Holdings Attrib	XYZ Capital • Can View •	t ESG Data		
Level Chart	Custom Text Z Notify people	3asic Info	EDIT INFO	
XYZ CAPITAL - HORIZON 80/20 GROWTH PORTFOLIO (P:1509853) LEVE	Enter custom text	Rebalance Frequency	Quarterly	
5D 1M 3M 6M YTD 1Y 3Y 5Y 10Y MAX		Start of Series History	Oldest DUCKFLOWS	
	ок	nitial Series Level	10000	
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Precise Access Control and Enhanced Security

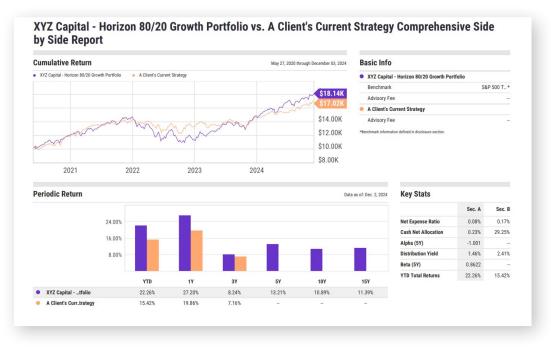
 Use YCharts to form groups directly, streamlining how your firm manages and shares bespoke solutions with advisors at specific Independent Broker Dealers or RIAs who already subscribe to YCharts.

YCHARTS	DATA	TOOLS	SUPPORT	Enter text or press "/"	Q		F 4	()
Account Settings								
Account Basics Membership Payment & Billing			hare Groups (^{ups}	<u>?)</u>		Group Per	nission	
User Preferences		Ŧ	XYZ Capital			Share		×
Report History Share Groups		Œ	Advisor Models			Share		×
Report Branding			ABC Financial			Share		×



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.

Reach Out to Build Your First Share Group