



**FAMILY**  
**WEALTHGURU**  
WEALTH MANAGEMENT

Benefits Of  
Choosing The Right  
**Wealth  
Management  
Software**

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# Benefits Of Choosing The Right **Wealth Management Software**



The thought of asset management often stirs stress and anxiety because it seems complicated and time-consuming. Fund Managers, Family Office Managers and High-Net-Worth Individuals often shy away from investing in Wealth Management Software because it seems unnecessary and expensive. However, managing and protecting wealth is a process of consultative review. Therefore, relying solely on rudimentary spreadsheets is an extremely poor financial decision. Mismanagement of wealth due to inefficient methods often leads to losing control over financial growth, which in turn creates greater stress and lower productivity.

By the time people realise the importance of Wealth Management, their assets are scattered and hard to consolidate and manage. This is where Wealth Management Software comes in. This specialised software caters to your financial needs and gives you valuable access to information such as On-time Market Reports for new investments, Stock price and Present-day Jewellery Revaluation Data. This crucial information can help high-net-worth individuals and businesses to maximise their growth potential and manage their assets in a safe and secure way.

*The famous author and investor Benjamin Graham, known as the Father of Value Investing once said that - "Successful investment is about managing risk and not avoiding it."*

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High-net-worth-clients require appropriate advice and monitoring to manage their asset class. This includes various financial services and adequate tools for tracking. Wealth Management Software brings together several benefits of financial services; professional monitoring and the right approach to managing multiple assets. This software encloses all aspects of financial planning from an individual portfolio aggregation to family holdings statement. It is a holistic approach to all asset classes and helps a client reach their desired financial goals. Families with a high-net-worth and multiple properties will gain adequate information regarding Fixed Assets, Family Holdings, P&L and Market Reports from the Wealth Management Software. This enables individuals, families, fund managers and investors to deal with current and future financial scenarios in a better way.

*Wealth Management Software will make keeping track of wealth through spreadsheets redundant in 2019:*

With technological advancement in software development, spreadsheets are becoming more and more impractical. As spreadsheets are messy and hard to use, fewer people want to rely on them to track important data. Switching to Wealth Management Software to manage Portfolio Aggregation brings various asset allocation of individuals and families under one centralised platform. This software helps you determine strengths, weaknesses, opportunities and threats of your asset class. People no longer have the time or patience to put together financial information such as the market value of their shares, bonds, jewellery, and properties. Wealth Management Software

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does all the hard work for you by synchronising all relevant information and communication. This software automates all your paperwork and reports which saves you the time and cost of tracking assets through multiple inefficient systems. With Wealth Management Software, you can formulate innovative financial strategies to maximise your net asset value.

*In a sample of 22 spreadsheets, KPMG found errors in 91% of them.*

It's quite evident now that portfolio management is a great deal of work. Financial stability and growth require wise investments, the right advisory, and perseverance. Wealth Management Software combines financial investment counselling and wealth monitoring which empower investors and fund managers to expand their opportunities in high potential markets. Investing in Wealth Management Software is the same thing as investing for a safe and financially sound future.

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## Benefits of Wealth Management Software:

### **Helps You Chalk Out The Financial Plans For Growth**

Wealth Management Software provides systematically calculated data and reports which gives insight to the user so that they can strategise future investments. This software also provides an overview of the client's overall wealth distribution. The system developers of Wealth Management Software take into account the client's requirements and financial goals and thus the software integration helps by forming adequate strategies to meet the users desired goals.

### **Makes It Easy To Track Multiple Properties**

Many people spend a good amount of time evaluating and readjusting accounts manually. Direct software integration can save a lot of time by maintaining and keeping everything under one roof. By regularly assessing financial statements created by the software, clients and businesses can be assured that tracking is accurate and error free.

### **Tedious Tasks such as Reports, Invoice and Holdings Statement Are Automatically Generated**

Nearly all reports, invoices, and routine tasks can be automated with Wealth Management Software. A single click generates market reports, family holdings, performance report, mutual funds and, IAF reports. Eliminating manual work makes the process of generating information quick and error free.

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## **Users Save Big on Operational Costs**

Wealth Management Software assists you in bill payments, checking your fund status, updating security prices and tax-related information. For families and individuals with multiple assets and an extensive portfolio, it's advisable to manage your wealth with professional help. Instead of waiting for someone to update crucial information in a spreadsheet, an auto-update on Wealth Management Software lets you see the updated status of your portfolio aggregation. This software accelerates financial growth and helps you lower operational costs by managing all relevant data under a single platform.

## **Quick Dashboard Setup**

Wealth Management Software allows you to see all relevant information on your personalised dashboard. The dashboard shows you a full view of all your accounts. The greatest advantages are real-time updated reports, automatic allocation of taxes, new price alerts and much more.

## **Identifying Risk Won't be a Tough Task anymore**

Software integration makes asset management an efficient operation. It also includes risk analysis that is associated with the user's asset or wealth class. Proper monitoring can certainly help to identify risks and further come up with a solution. Wealth Management Software also alerts businesses of any risks it has identified.

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# Benefits Of Choosing The Right **Wealth Management Software**



Wealth Management Software combines financial counselling and investment management for high net worth businesses and clients. It also helps clients with their investment strategies, accounting and tax services. Wealth Management Software integration offers assistance in property management, securities and other investments.



At FACT, we have designed Family Wealth Guru, a Wealth Management Software with state of the art technology. We thrive to help you with much more than just portfolio aggregation. You can now manage IT returns and accounting work through Family Wealth Guru's structured and automated solution. Family Wealth Guru is exclusively designed to aid high net worth individuals and families in managing their wealth to help investors create and execute ambitious financial plans. This software has a profound understanding of client requirements and helps them to achieve their financial goals.



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Let us walk you through some of the amazing features of FamilyWealthGuru that not only manages your portfolio but it also helps you make smarter financial decisions.

## **Wealth Dash-Board**

- Single-Click Real-time Reports
- Mark-to-Market Graphs
- Comparative Graphs with Indexes
- Historical Price Movement Graphs
- Consolidated Family Holding
- Comparative Performances and much more

## **Auto Import from PDF Files**

- Contract Notes
- Mutual Fund Statements
- IAF Statements

## **Report Generation**

- Multiple Demat/Depository Holdings
  - Automatic Asset Valuation at Cost
  - Recurring Rent Invoicing
  - Automatic Allocation of Taxes & Brokerage
  - Automatic GST & TDS (Withholding Tax)
  - Automatic P&L and Balance Sheet for easy filing of Income Tax Returns.
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Family Wealth Guru offers portfolio aggregation with automatic mark-to-market value updates. With an unbeatable combination of data security, spreadsheet free tracking, and slice & dice capability that requires no manual work, Family Wealth Guru is ideally suited for Family Offices, External Asset Managers and Fund Managers.

The developers at Family Wealth Guru invest a lot of time to help you meet your financial goals faster and more efficiently. If you are thinking of Wealth Management Software integration, think about Family Wealth Guru. You work hard building your wealth and Family Wealth Guru puts you on Top of the Game!

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