



FINCAST

THE FUTURE OF FINANCIAL ADVICE

Future proof your business by utilising Fincast

Fincast is an interactive, client facing investment tool kit, powered by a sophisticated adaptive advice engine, that enables you to deliver market relevant financial advice to more clients.

Fincast's framework is easy to use and flexible

Train our adaptive advice engine's algorithms to provide investment solutions tailored to your requirements, including:

- ✓ Market and risk limits (country, asset allocation and sector)
- ✓ Product/investment preferences
- ✓ The option to include your own capital market assumptions.

Our engaging, client facing interface can be customised, including your own branding and corporate colours.



Adaptive advice engine tailors the recommendation to the prevailing market conditions



Increase engagement with clients by using interactive charts and graphs



Enhance the capability of your Advisers



Gain deeper insights into your clients and their buying behaviour



Flexible framework - Train our adaptive advice engine's algorithms to construct investment solutions tailored to your requirements



Reduce compliance risk

TWO MODULES POWERED BY A SOPHISTICATED ADAPTIVE ADVICE ENGINE



ADVISER MODULE

- ✓ A flexible, goal based advice tool designed to help Advisers work more efficiently and increase client engagement
- ✓ Seamlessly guide clients through fact finding, risk profiling and asset allocation, and adjust variables in 'real time'
- ✓ Increase the transparency of advice using interactive charts and graphs including wealth projections, cash flow modelling, Stress and Back testing
- ✓ Compare a client's existing assets against an optimised portfolio of assets
- ✓ Generate recommendations relevant to the prevailing market conditions
- ✓ Use with clients in face-to-face or remote meetings



AUTOMATED ADVICE MODULE

- ✓ Expand your client base by creating your own unique Automated Advice application, delivering valuable advice at a lower cost
- ✓ Clients answer simple questions on their objectives and risk profile and our engine guides them to an appropriate strategy
- ✓ Clients can implement the strategy and receive ongoing guidance from you on managing their assets

OUR CLIENTS INCLUDE:

WEALTH
MANAGEMENT GROUPS

FINANCIAL
INSTITUTIONS

FINANCIAL ADVISORY
GROUPS

INSURANCE GROUPS

STOCKBROKING
HOUSES



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CONTACT US

Suite 402, Level 4, 24 Hickson Road, Millers Points, SYDNEY NSW 2000 Australia
Phone: +61 (0)2 8003 5919 Email: info@fincast.com.au Website: www.fincast.com.au