

PRIMA ALLOCATIONGUIDE™

Prima AllocationGuide™ is an easy-to-use investment planning application that represents an end-to-end solution for financial advisors, from client assessment to proposal generation. Prima AllocationGuide™ can help advisors:

1. Assess an investor's financial goals and risk tolerance.
2. Evaluate existing investment portfolios.
3. Select a risk-based model portfolio.
4. Analyze in-depth analytics for current vs. target portfolios.
5. Generate a high quality proposal including an Investment Policy Statement.

Successful wealth managers rely on a certain degree of both "art" and "science" to advise clients. Prima AllocationGuide™ strikes an appropriate balance by providing the toolsets and analytics an advisor needs, with the flexibility and simplicity advisors value.

BENEFITS FOR WEALTH MANAGEMENT FIRMS

Prima AllocationGuide allows advisors to present proposals in an organized manner with depth and breadth. At the same time, sponsor organizations can tailor the web-based application to their organization and support:

- Increased advisor efficiency and effectiveness
- Improved scale and consistency of investment research and advice delivery
- Investor education and goal planning



A sample simulation generated by Prima AllocationGuide™

PROCESS WORKFLOW AND FEATURES

Prima Capital has been at the forefront of technology development in the Wealth Management industry for over ten years. Prima AllocationGuide™ features powerful toolsets from our research application, PrimaGuide®, such as historical simulations, product profile reports, and educational client presentations.

