

1. Client objectives

The first step is to understand your clients' requirements and their goals. To retrieve your clients' data, you can seamlessly integrate with your back office.

2. Risk profiling

Combine your clients' requirements with the psychometric questionnaire results and likely outcomes to agree a profile to ensure suitable recommendations.

3. Research

Combining goal based research and dynamic three-way research helps you to recommend suitable funds, products and platforms. You also have the flexibility to adapt the process to your CIP.

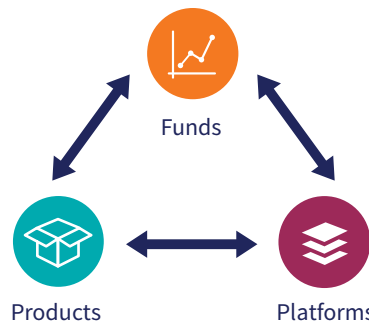
4. Report

Engage automatically documents every step you have taken and combines this with the discussion notes to create a fully editable, detailed report.

Use your preferred psychometric questionnaire to ascertain your clients' natural attitude to risk.



Project and model likely outcomes using Moody's stochastic engine, which looks at 1,000 possible scenarios.



- More than 16,500 funds 
- Over 200 DFM propositions and 1,400 DFM managed portfolios
- Over 600 Defaqto risk rated funds and DFM managed portfolios from leading fund managers
- Import and review clients' existing portfolios
- More than 55 platforms

Defaqto Ratings help you make better informed recommendations.



Products, DFMs and platforms



Funds



Products, DFMs and platforms



Time to goal



Required return



Capacity for loss



Income requirement



Volatility tolerance



Investment amount



Include graphs and data visuals



Document client discussions



Automatically produce audit trails



Create and share client summaries



Send reports to back office



Keep on file