



MULTREES



Multrees Compass

For professional adviser use only

Your Challenge

As a wealth manager, you require easy and reliable access to relevant asset information to improve your operational efficiency and client experience.

Our Advanced Answer

- At Multrees, our online interactive web portal, Multrees Compass, provides a tailor-made combination of high quality services to help you view and manage your customers' assets more efficiently.
- Within one single sign-on, Multrees Compass provides a suite of integrated self-service solutions including global custody, portfolio modelling, order management, multi-level business intelligence reporting and analytics.

Key benefits for you and your customers



Our Services

Global Custody



Investment Administration



Reporting Services



Client & Investment Management Tools



About Multrees

Multrees is an independent provider of global custody, investment administration and consolidated reporting services to wealth managers and private investment offices.

Our specialist operational teams have a wealth of experience acquired across the financial services industry to seamlessly integrate our custody, consolidated reporting and investment administration services.

Client and business reporting solutions

We work with you to provide customised open architecture business support solutions that help you to differentiate your businesses and propositions.

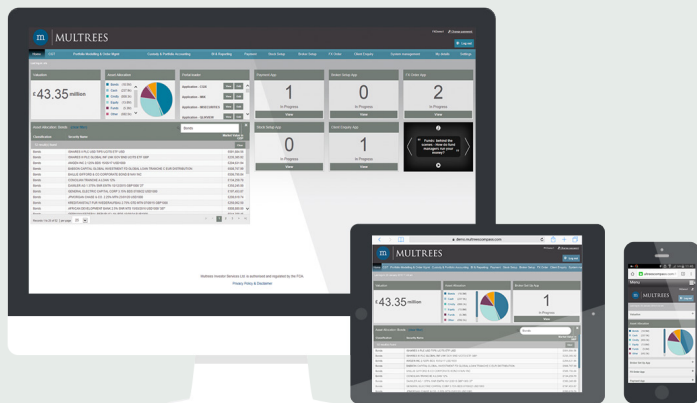


Multrees Compass – a leading Wealth Management Portal

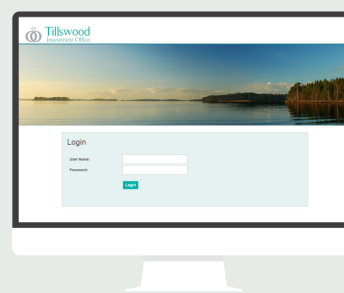
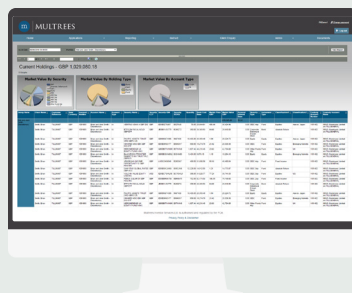
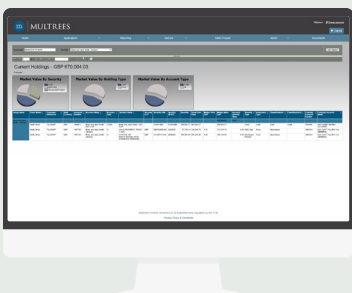
With increasing necessity to manage operational costs and provide better client outcomes, Multrees Compass gives you a business solution that addresses the key servicing requirements of your customers. Under one single sign-on, your valued employees get a holistic visual display of customer information and a role-specific range of functionality and integrated services based upon their needs and priorities.

Just as everyone gathers their own combination of applications on their smartphone, your team can assemble the specific services required based on secure credentials and permissions.

At the same time, you maintain control and choose who has access to specific functions and content to comply with your business' and customers' requirements. This enhanced user experience frees up your time to focus on developing customer relationships, advancing new opportunities and increasing business volume.



- A range of tools all under one easy-to-navigate portal
- Interactive, secure and flexible
- Keeps you in control of your client relationships
- Provides state-of-the-art business intelligence tools
- Available across devices
- Client branded interface



For further information about our business support solutions please contact your usual relationship manager at Multrees. Alternatively, you can contact us on 0131 247 5000 or by email at info@multrees.com

Multrees Investor Services Ltd is authorised and regulated by the Financial Conduct Authority (FCA).