

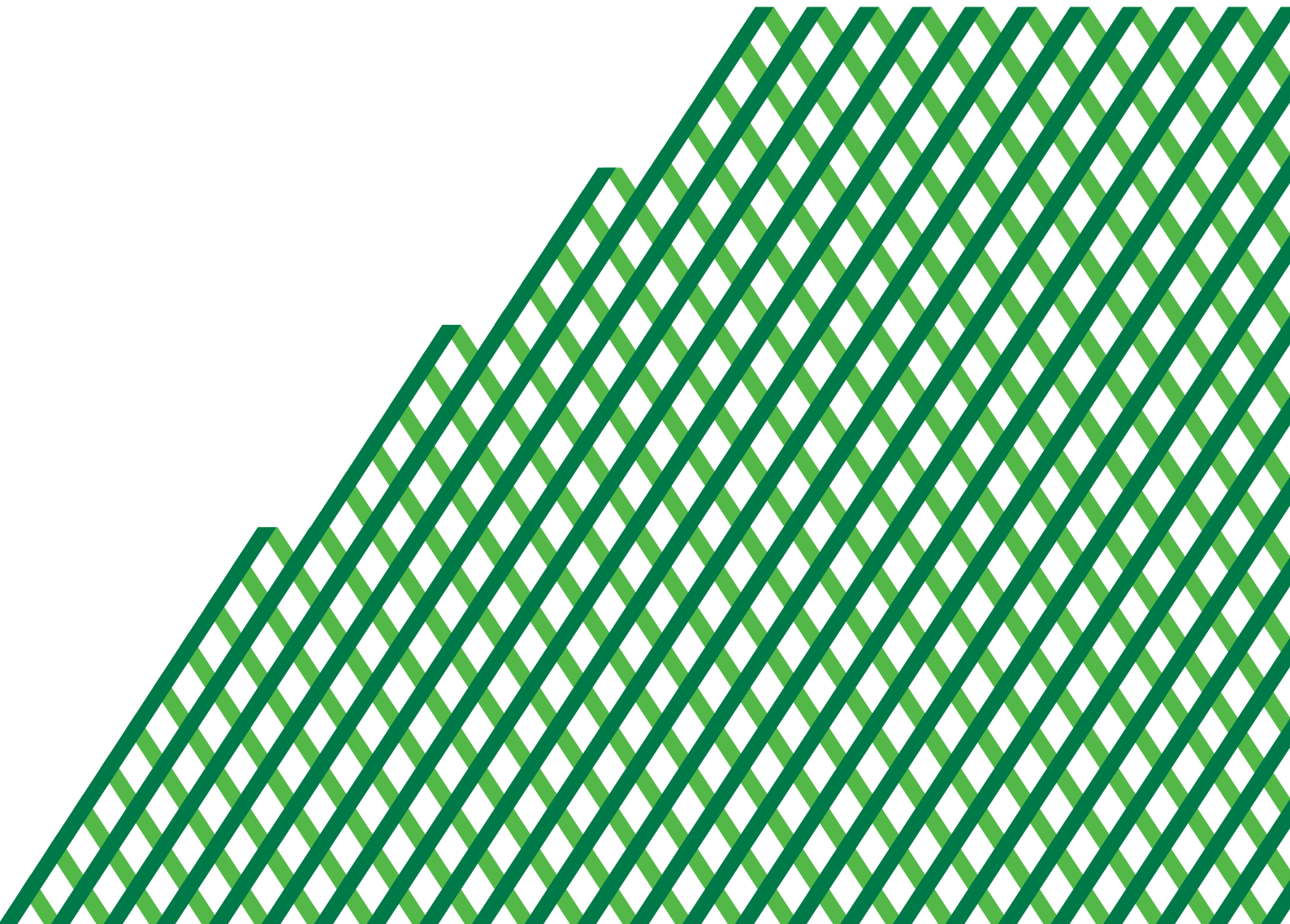


Where Smart Investing Grows  
Rewarding Client Relationships

# Your smartest investment yet

The advisory space is increasingly competitive and your clients have many options. You need to constantly demonstrate your value to show you are the investment professional of choice. Leveraging powerful web-based tools to make sound investment decisions and to create compelling client presentations can deliver the advantage you need to build your business.

Whether you are a financial advisor, analyst, or product provider, Zephyr is your key to client retention and asset accumulation. Robust investment analysis capabilities, custom portfolio construction tools, and insightful visuals help guide your thinking and showcase your know-how.





# Achieve your clients' wealth goals and build trust in your decision-making

Put Zephyr to work for you.

**Financial  
Advisors**

Make the right investment choices for clients and demonstrate your ability to generate wealth with access to a wide array of analytical tools and presentation capabilities.

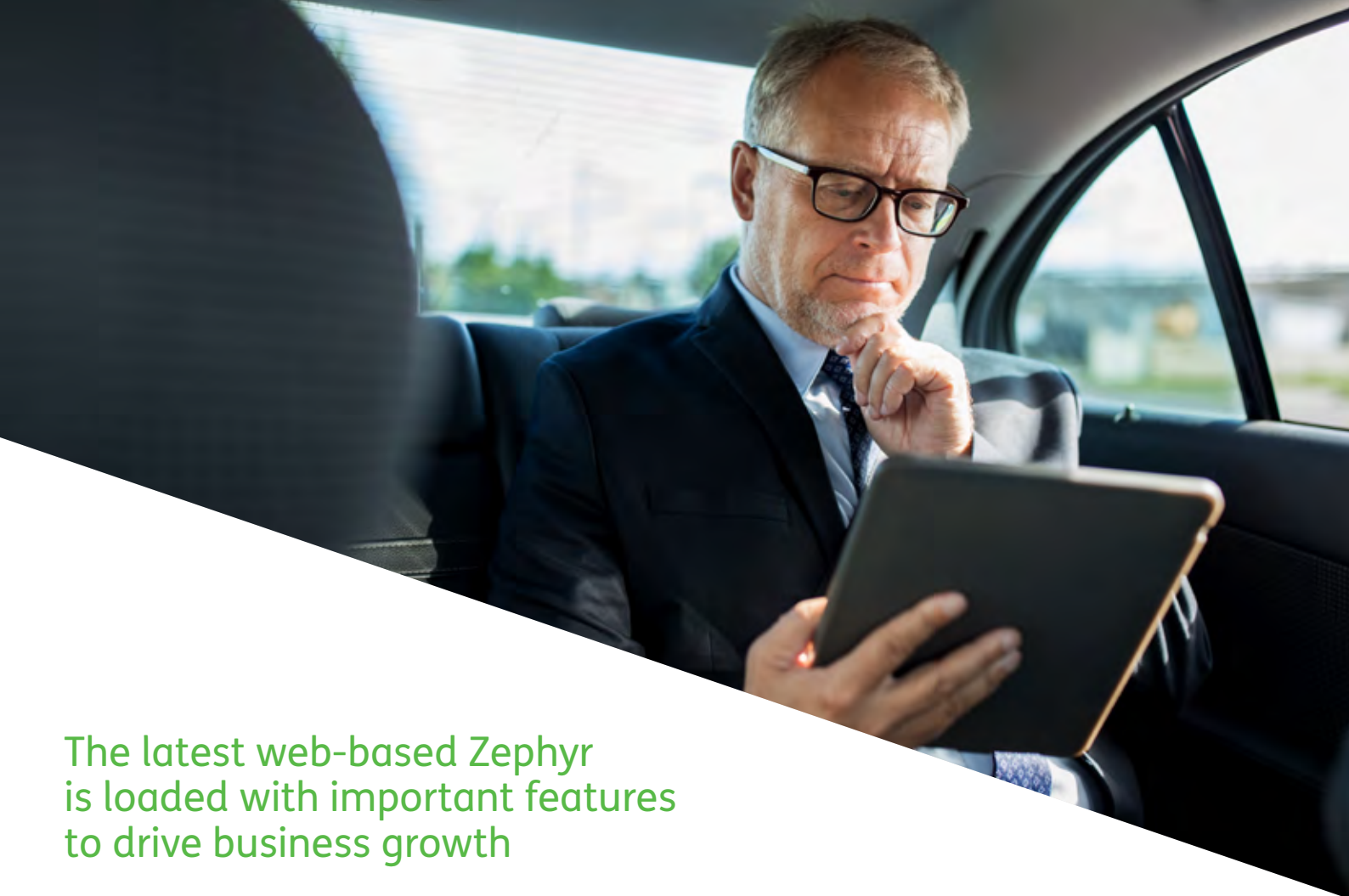
**Analysts**

Deliver on your performance goals with portfolio construction and optimization tools to design solutions that align with your clients' specific financial objectives.

**Marketers and Product  
Managers at money  
management firms**

Better position your offering with a view into the criteria used for product selection, plus an understanding of the competitive landscape.





## The latest web-based Zephyr is loaded with important features to drive business growth

### Do Your Due Diligence to Make the Best Investment Decisions

- Screen thousands of investment products with powerful sorting, filtering, and statistical tools.
- Access one of the largest Separate Account databases in the industry.
- Track and compare multiple investment products and run returns-based style analysis using 200+ key statistics.
- Build portfolios using a variety of optimization techniques.
- Run Monte Carlo simulations to estimate the probability of meeting future wealth goals.
- Let the Zephyr Analytics API improve the user experience and coverage for your internal and external applications.

### Then Package Your Thinking for Meaningful Client Discussions

- Create interesting graphs to display a client's current portfolio, and brand pages with your logo and footnotes.
- Dig into data screens to show why certain products are better suited for his/her needs.
- Toggle between different attribution models to review their applicability.
- Develop customized reports comparing managers to a benchmark.
- Prepare in-depth research presentations to validate your recommendations.

## Learn more about how Zephyr can work for you:

To continue, please choose:

Financial Advisor

Analyst

Marketer/Product Manager