

# Enhance Client Communication

## Importance of models:

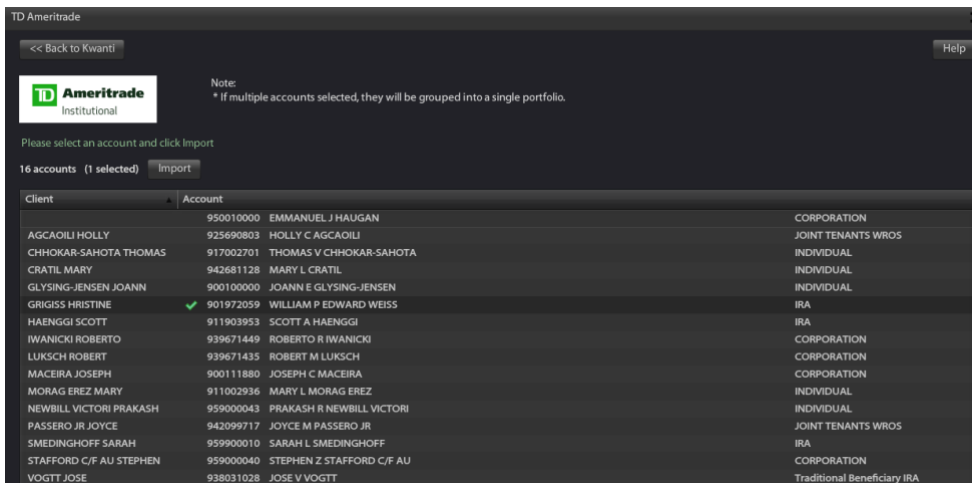
In parts 1 (Building your Models) and 2 (Prospecting with Kwanti) of our Methodology series, we discussed how advisors can take advantage of Kwanti to enhance the internal functions of their firm. The last piece of the puzzle is using Kwanti to enhance your client communication.

## 1: Account Integration

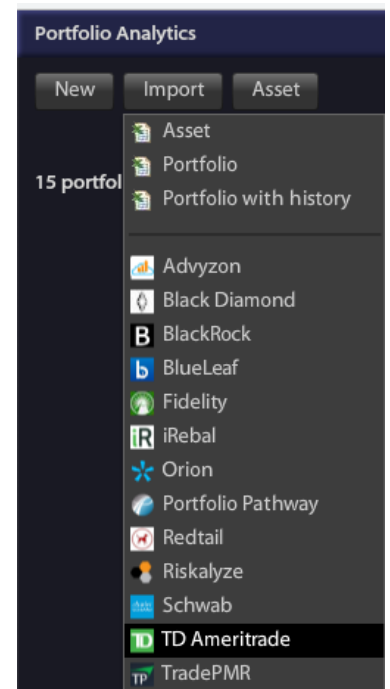
There is no shortage of Fin-Tech tools for financial advisors to take advantage of. Kwanti is constantly working to develop new relationships with partners to make integrating your clients accounts into Kwanti that much easier.

### a. Integration Partners

With any of our current partners, Kwanti users have the ability to link their client accounts from our partner to their Kwanti account. A **linked account** has its positions automatically imported from the custodian every time you start Kwanti, eliminating manual transfer



operations.



As an example, current Kwanti user Brandon Grundy is a big fan of Kwanti's integration with TD Ameritrade's iRebal system and Orion.

*"We can easily bring in portfolios from Orion into Kwanti to make model comparisons," he says. "From there, we can easily push them into iRebal to make the tweaks to ensure the rebalancing is accurately and quickly completed." These three systems work hand-in-hand and make our business a lot more productive."*

A list of our current integration partners can be found on our website at [kwanti.com/partners](http://kwanti.com/partners)

## b. Grouping

In many cases, advisors manage multiple accounts for a family. For example, you may manage a couples joint brokerage account as well as each spouses IRA accounts. In addition to having the ability to look at these on the individual account level, you can also group accounts to view them at a household level.

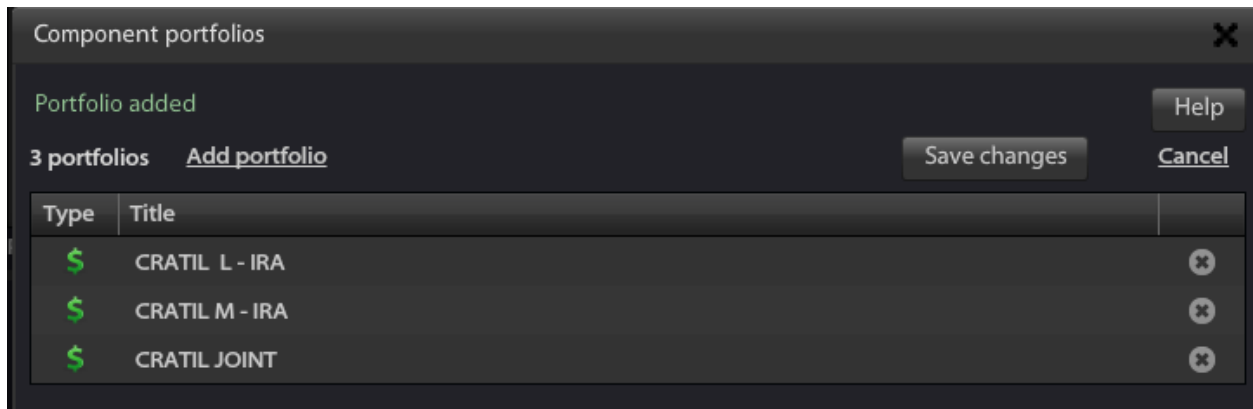
New portfolio

Please select a title and portfolio type Help

CRATIL - Household

- Model portfolio %
  - Manage positions by weight (%)
  - Weights remain the same until you change them
- Real portfolio \$
  - Manage positions by number of shares
  - Weights are calculated every day based on the shares market values
- Group 9
  - Combine real portfolios (household view)

Cancel Create



## 2: Elegant Presentations

Depending on both the preference of you as the advisor and the type of client you are working with, Kwanti give you a variety of elegant presentation options.

### a) Interactive Presentation

You may have a client who is a bit more tech savvy clients and prefers to go over the details in a engaging, interactive way. This is an opportunity to showcase a prospect's or client's portfolio using real-world data on a tablet, laptop, web conference or projected screen.





## b) PDF Report

On the other hand, some clients may prefer a customized PDF report that they can print out and review. Kwanti supports fully customizable PDF reporting which is linked to the software. The advisor can make changes directly on the PDF and those edits will be saved in the advisor's Kwanti account as well as in the printed report received by the prospect.

The screenshot displays the Kwanti PDF report interface. On the left, there is a sidebar with navigation options like 'Cover page', 'Holdings', 'Allocation', 'Performance', 'Statistics', 'Correlations', 'Funds Expense', 'Securities', 'Disclosures', 'Add Content', 'Data', 'Portf A', 'Portf B', 'Bench', 'Style', and 'Disclaimer'. The main content area shows a 'Performance' report prepared on Mar 26, 2019. It includes three small charts for 1, 3, and 5-year returns, followed by a table comparing 'Prospect Portfolio' and 'Model Portfolio' across various metrics.

	1 year	3 years	5 years
<b>Annualized Total Return</b>			
Prospect Portfolio	4.2%	9.4%	5.4%
Model Portfolio	4.9%	10.1%	7.5%
<b>Risk (standard deviation)</b>			
Prospect Portfolio	13.7%	8.8%	8.8%
Model Portfolio	13.3%	8.8%	9.3%
<b>Alpha</b>			
Prospect Portfolio	-2.6%	-0.9%	-2.9%
Model Portfolio	-3.3%	-0.8%	-1.5%
<b>Data</b>			
Prospect Portfolio	1.01	0.95	0.93
Model Portfolio	0.97	0.95	0.97
<b>Sharpe ratio</b>			
Prospect Portfolio	0.22	0.95	0.55
Model Portfolio	0.15	0.93	0.71
<b>Maximum drawdown</b>			
Prospect Portfolio	-14.9%	-14.9%	-10%
Model Portfolio	-14.6%	-15.9%	-15.9%

Distribution rate: Prospect Portfolio: 1.05% Model Portfolio: 2.00%

Model assumptions:  
 Dividends: Prospect Portfolio: reinvested, Model Portfolio: reinvested  
 Simulation: Prospect Portfolio: Quarter rebalance, Model Portfolio: Monthly rebalance  
 Advisory Fees (annual): Prospect Portfolio: .75%, Model Portfolio: None  
 The benchmark used to calculate alpha, beta is: Blend US 80% stocks 20% bonds

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## What current advisors Have to say about Kwanti's presentation options.



**John Garrity**  
Founder  
Peak Wealth Management

What stands out to Garrity about Kwanti is its visual displays, rich interface and pleasing aesthetics. **"The visual experience of Kwanti is so superior to any other platform out there.** We use it every day and when we show it to clients and prospects in our conference room, they are immediately impressed with our capabilities and respond well to our recommendations.