

CALASTONE WRAP REPORTING

Calastone Wrap Reporting allows fund managers to more easily understand sales performance and interrogate fund flow data by receiving platform reports in a single consistent format.

With just one connection to Calastone, fund managers get easy to integrate platform reports as soon as they are issued by their partner platforms. It means firms can quickly build a consolidated view of their adviser activity for use by the sales and product teams.

Calastone Wrap Reporting has been built in conjunction with the industry, is delivered via our robust global network and supported by our dedicated operations team and local relationship managers.

THE CALASTONE DIFFERENCE

OPTIMISE YOUR ADVISER RELATIONSHIPS —
Maximise business development opportunities, identify sources of outflows — fine-tune your targeting and provide more support to your influencing advisers by receiving platform reports immediately in your format of choice.

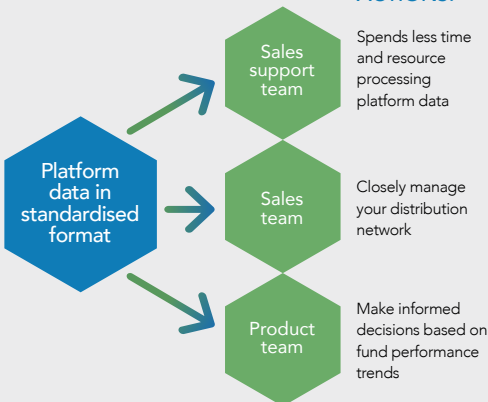
EASY TO INTEGRATE THIRD PARTY DATA —
Reduce the time spent integrating third party data into your CRM system by using Wrap Reporting to automatically reformats and sends platform reports as soon as they are issued directly into your system of choice.

Why Calastone Wrap Reporting?

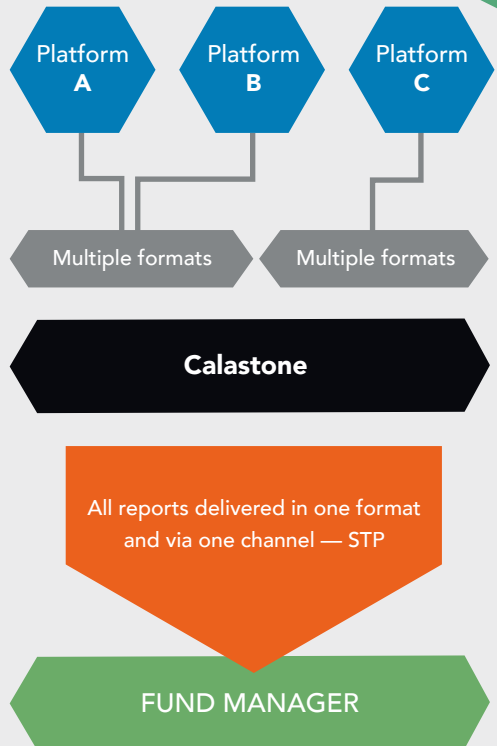
Calastone Wrap Reporting was developed with the industry to directly address the challenge of more quickly understanding adviser activity by improving the handling and integration of platform reports.

The Wrap Reporting solution automatically reformats and sends platform reports as soon as they are issued. By having reports in one standardised format fund managers can more easily integrate platform data into their systems and spend more time deriving insights from the data.

Calastone's dedicated support function and leading network of platforms across Australia and New Zealand work to provide fund managers with the ability to optimise new and existing platform relationships and focus on helping advisers maximise their fund sales.

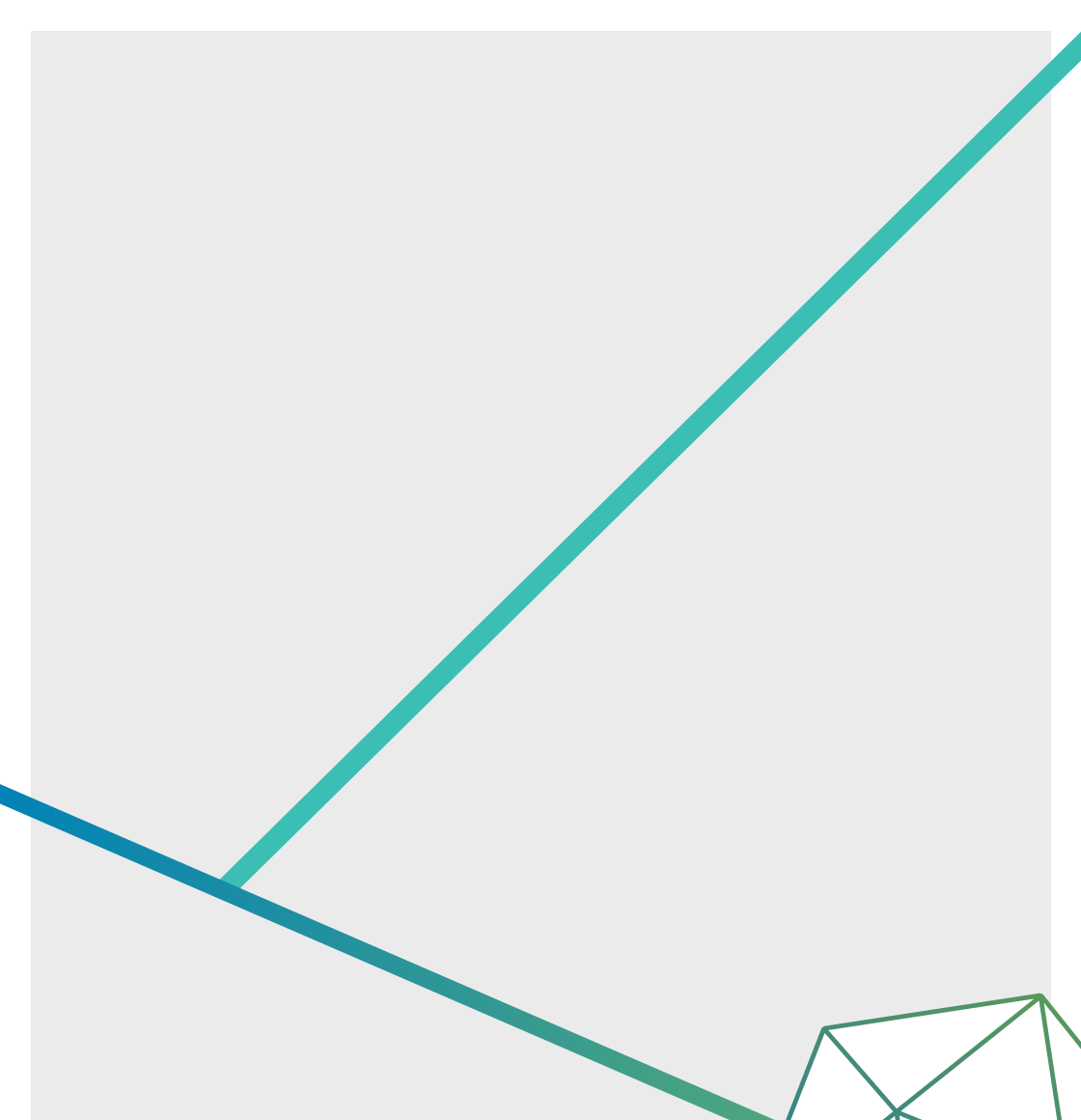


Calastone Wrap Reporting – process flow



HOW DOES IT WORK?

1. Nominated monthly platform reports are translated and sent to you STP in a single consistent format.
2. Reports are delivered in flat-file format and sent through a secure connection via SFTP.



Find out how we can help you transform your distribution data processing, contact marketing@calastone.com

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Calastone

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