

Creating Report Packages

Key Benefits

Save time and focus on what you do best—building client relationships—with these easy-to-assemble Report Packages.

Present high-quality, professional looking Report Packages to investors monthly, quarterly or annually. Providing a personalized view of your clients' portfolio performance regularly helps you build strong, long-term relationships with them.

Report Packages

Report Packages are composed of a customized selection of reports, packaged with a cover page and table of contents. Report Packages include any of the standalone reports offered, sorted in the order you deem most appropriate for your clients. Capitalizing on the value of Report Packages enables you to:

- › Enhance service by providing a consistent, professional client presentation
- › Increase efficiency by combining multiple reports into a single output
- › Customize the type of information delivered to your clients
- › Prepare for your monthly, quarterly or annual client reviews

Name, choose and sort your Report Package

Settings – Report Packages

Step 1: Select the **Name** link to choose the name for your Report Package, click submit.

Step 2: Select the **Content** link to choose the reports that you would like to include in the package, click submit.

Step 3: Select the **Sort** link to choose the order of your Report Package, click submit.



Sample Report Packages

Report Settings Asset Classification Benchmark Cost Basis Model Performance Calculation Report Package Risk Admin

Set Default Report Package Setting(s)

Name Sort Content	Name Sort Content	Name Sort Content
report Package1	Report & Package test2	Report Package 3ab
1 Cover Page	1 Mailer Page	1 Cover Page
2 Portfolio Summary	2 Cover Page	2 Holdings by Investor
	3 Redesign Holdings by Classification	3 UMA Performance
	4 Manager Allocation	4 Account Performance
	5 Holdings by Investor	
	6 Asset Allocation - Asset Type	
	7 Holdings by Investor (Landscape)	
	8 Market Commentary	

Submit Cancel

Submit Cancel

Submit Cancel

For more information

To learn more about creating Report Packages, contact your client service representative.

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albridge.com

1800 American Boulevard, Suite 300
Pennington, NJ 08534
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