



## PMS WITH WT- WMS (WEALTH MANGEMENT SYSTEM)

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Market regulator **M/s. SEBI** has recently removed the Upfront Load for Mutual Funds transactions and other Industries are going to follow by removing Brokerage from source (i.e. Insurance/ Postal/ Small Savings). Now for advisors, the major source of income will be “Advisory Charges” only to be collected from the clients.

❖ **Advantages:** - Already you are charging Advisory fees to your clients as Portfolio managers. Till date, you were facing the problem by “No Fee Based” distributors who were already highly paid by the source (i.e. AMC, Insurance companies, etc.). This is the great opportunity for “Fee Based Advisors” as you are already currently working as Portfolio Managers.

### ❖ **WHY FIN-SOFT???**

Fin-Soft the ‘One-Stop-Shop’ is competent to provide products for all target segments in this industry....Banks, Multi Branch Distributors, Multi Product Distributors, CAs, CFPs, Portfolio Managers, etc. We would like to introduce our self in the Indian Financial Market as a Pioneer of the Advisory Software. Our presence in the market is since year 2000 & we are maintaining all the products with our highly experienced skill & domain knowledge with transparency.

Fin-soft is providing solutions in the form of software including all the Financial Products such as Mutual Fund/ Equity/ Bonds/ FD/ Non-conventional Instruments.

**Advisors** need something better to offer investors so that they can “**Charge**” fees from there investors against the best services landed to them.

Fin-Soft is offering **WT- WMS**, a comprehensive web-based solution to **PMS** advisors.

❖ **Wealth Track - Wealth Management System (WT-WMS)** is basically developed to provide the provision of a specialized set of **financial services** (banking, brokerage, financial planning, estate management, etc) integrated together. **WT-WMS** is available for Mutual Fund & also available for Bonds/ Equity/ FD/ Non-Conventional Instrument (Real Estate, Gold, Art, Jewelry, etc.)/ Consolidate Reports/ Financial Planning\* (Includes Client Profiling\*, Building-up Portfolio, Client Profile Report, Financial Health Check Report, Risk Assessment Process Detail Report, Asset Allocation of Current & Suggested Portfolio).

**WT- WMS** is providing Easy but Fully Secured Access of the software available on the Web. 100% Data Secrecy & Secured as Database will be on your server.

Generates various client, sales performance, brokerage, sub-brokerage, MF performance reports, etc. You can manage your client’s entire Portfolio by providing Prime reports (Cash Flow Summary to reconciliation with Bank A/c., Periodic Growth Report to show Portfolio Growth in specific period).

**Now its correct time to “Charge” your investors by providing best web facility & services like WT-WMS by FIN-SOFT SOLUTIONS from where you can get the solid, resilient, fast, scalable and efficient transaction and database management platform totally on web.**

(\*Optional)

For any further queries kindly contact us:

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