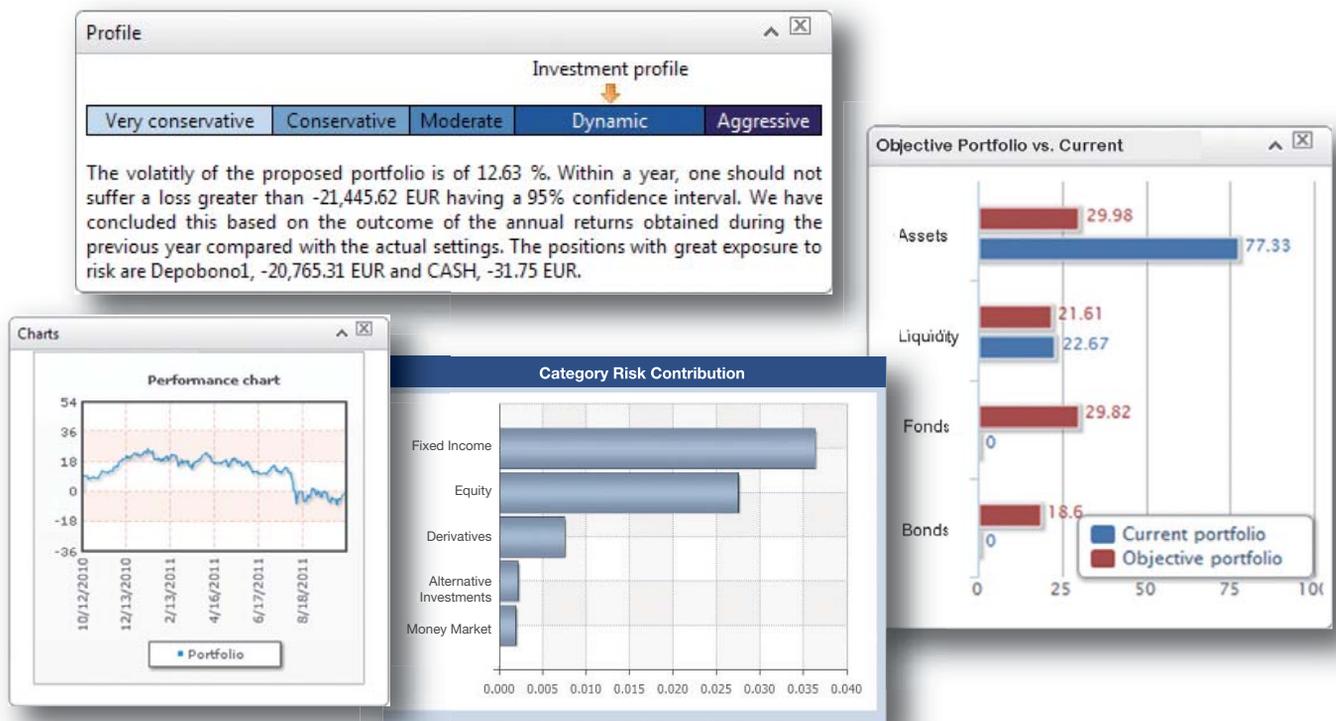


TechRules Investment Proposals

In a vast and changeable market of financial products, designing portfolios adequate to the clients' requirements and needs should be supported by a solid advisory tool.

Financial advisors should count with **complete and versatile solutions that enable them to create investment proposals tailored to their clients' needs**. Assessing the client's risk tolerance, identifying the investment objective and presenting a complete report of the proposal are necessary tasks in the advisory process.



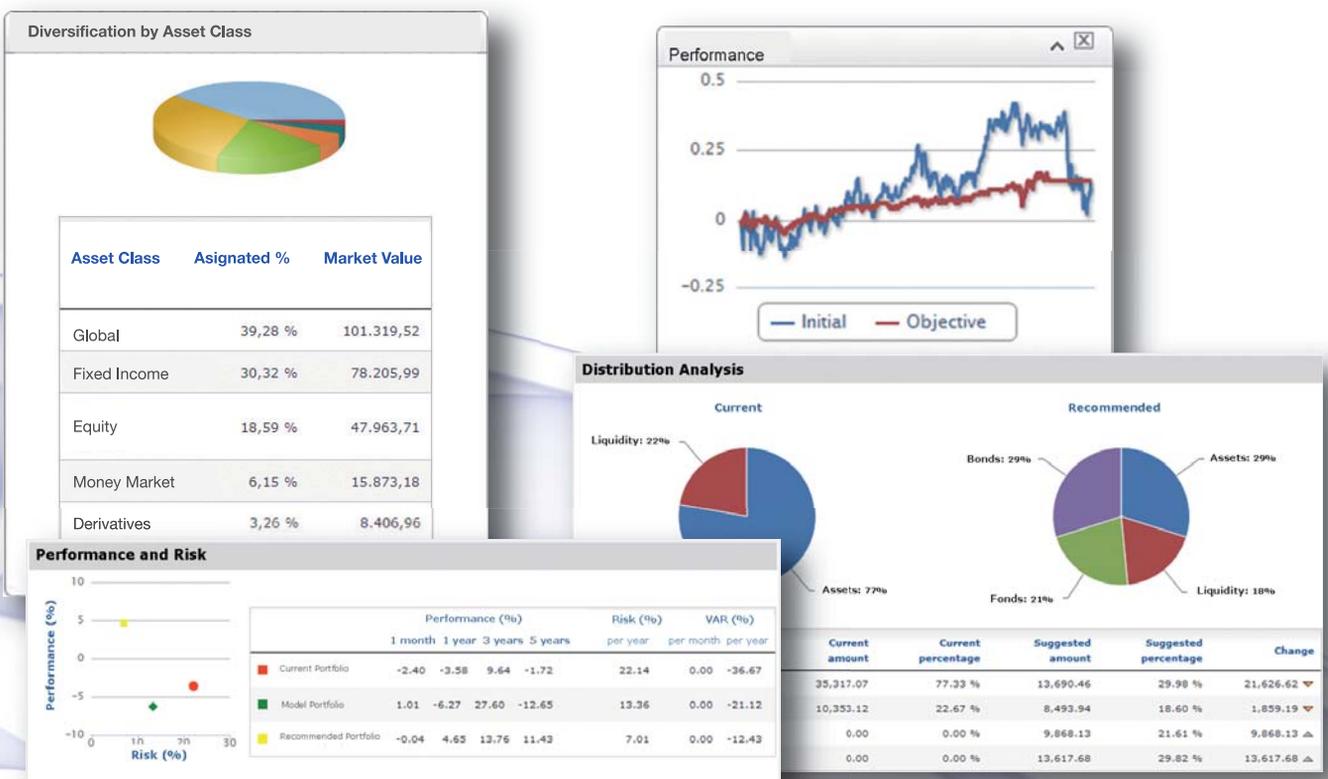
Advantages of TechRules Investment Proposals

- Risk evaluation questionnaire to obtain the client's risk profile
- Personalize the risk questionnaire
- Develop and manage different multiproduct and multicurrency investment strategies
- Consider the future long term results and show each strategy's probability of success
- Modify the original proposal and compare the changes before making the proposal
- Personalize the content and the format of the proposal report based on a wide range of possibilities
- Integral dashboard for the commercial activity carried out
- Enables integration either via web services and through Tower platform
- Easy to use, with a minimum training and an operative support

Financial advisors should easily reach well-founded proposals based on the different existing possibilities that offer the best guarantee of success.

To give always an appropriate financial advice, **TechRules Investment Proposals** offers a centralized system to obtain a client's profile and develop personalized investment proposals taking into account multiple limitations (commercial, client, financial, fiscal, etc).

Manage potential clients demonstrating the high level of service that you already offer to existing clients. Through a fast and simple process achieve a result which is both professional and easy to understand.



TechRules Investment Proposals makes it possible. Increase your sales by increasing the success percentage of its proposals, through the development of high quality and personalized reports you will be able to deliver the most appropriate information for each investment proposal.

You will have access to a **dashboard** containing all the relevant information of the commercial activity conducted by an advisor or group of financial advisors.

Comply with the **regulatory requirements** from the processes' point of view and when reporting on the commercial activity conducted by the institution.