

Value Added Services

Auto Advice / Signals

The concept of "Auto Advice" is to use the technology to help advisers to give more and better advice spending less time on the advice. Why not let the technology spend time for you? The AdvisorCube technology is collecting and aggregating a large amount of information every day, whether you work on or not.

Event driven

When a signal is triggered the technology send an email to adviser or client or both, depending on your setup.

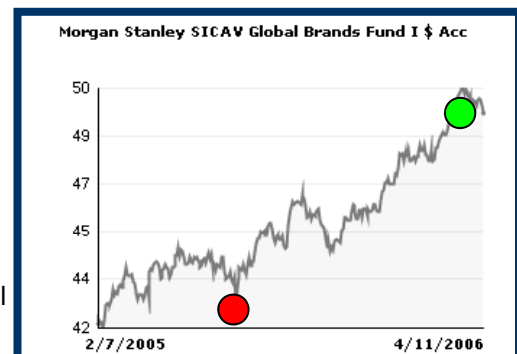
Signal Generator

You have advised your client to take a position in for example Morgan Stanley Global Brands Fund at a Market price 46.

You tell the client that if the price goes down to 43 he should Sell, as a "stop loss" strategy.

If the price goes up to 49 he should sell out to "take profit".

Using AdvisorCube "Auto Advice" you simply fill in signal level and the technology will look for the signals every day. When the signal is triggered the adviser and/or the client will receive an email from the system with the signal.



Birthday (coming soon)

Using the Fact Find service you can ask the technology send an email to you 1,2 or 3 before your client have a birthday.

We have under development other signals like:

Profit & loss (coming soon)

You may set limit for client profit and loss, so that the technology send an email to you and/or your client if a agreed level of profit or loss is reached.

Other events (coming soon)

AdvisorCube "Auto Advice" is a flexible tool giving you the option to have the technology doing the some of the boring part of your job.