

Value Added Services

Information Upload (holding, prices, instruments and clients)

Would you like to upload **transactions, holdings, prices, clients and information** from your provider ?

Most IFA's, Financial Planners and discretionary asset managers would.

Financecube technology allows you to upload from your provider for thousands of clients in a few minuets. No retyping of information, no manual errors and 100 % reliable.

This is the most secure way of uploading your client's information. You are using you secure log-on to your provider.

- 1 You log on to tour providers extranet or web-based adviser interface.
- 2 You download to your computer information and store the file on your computer.
- 3 You upload to Financecube.net this file and Financecube.net distribute information to your clients portfolios.

Provider



AdvisorCube



Adviser

You can do this as often you want to, every day, every week or every month, it is up to you. This will normally take from 2 to 10 minutes, depending on number of clients. Financecube.net can handle both transactions and holdings.

Have a look at our internet site

www.financecube.info/integrationlist.html for complete list.

