



PRODUCT

Proposals

Driving business growth with a streamlined proposal process

Addepar simplifies your proposal-generation process by seamlessly bringing your data and our technology together on a single platform. You can easily create, manage and communicate investment philosophies, make recommendations or demonstrate potential benefits with confidence to prospects and clients.

KEY BENEFITS



EFFICIENCY

Save time and minimize the errors associated with manual data entry, Excel manipulation and moving data among different software applications.



CUSTOMIZATION

Structure, analyze and view proposed changes based on your own unique perspectives by leveraging any attributes, groupings or custom classifications.



EXPERIENCE

Build clients' trust by effectively communicating your investment strategies and recommendations using visually appealing reports with insightful analytics.

New Proposal						
Patrick Holland 2019-03-25						
<div>SaveExportAdd Investment</div>						
ASSET CLASS · SECURITY	VALUE (USD)	% OF PORTFOLIO	TARGET ASSET CLASS ALLOCATION (%)	PROPOSED % OF PORTFOLIO (USD)	PROPOSED CHANGE IN VALUE (USD)	PROPOSED VALUE (USD)
Cash & Cash Equivalent	\$10,000.00	0.12 %	0.00 %	0%	↓ \$-10,000	\$0
Equity	\$3,005,902.72	37.53 %	40.00 %	40%	↑ \$197,723.4	\$3,203,626.12
Fixed Income	\$3,646,626.24	45.53 %	40.00 %	40%	↓ \$-443,000.12	\$3,203,626.12
Hedge Fund	\$229,602.18	2.87 %	5.00 %	5%	↑ \$170,851.08	\$400,453.26
Private Equity	\$1,116,934.15	13.95 %	15.00 %	15%	↑ \$84,425.64	\$1,201,359.79
Unallocated				0%	\$0	
Total	\$8,009,065.30	100.00 %	100.00 %	100%	\$0	\$8,009,065.3

MAIN FEATURES

MANAGE PROSPECT FINANCIAL INFORMATION

Capture and manage prospects' investment objectives, target allocations, current asset holdings and other important information on a single platform.

MAKE PORTFOLIO RECOMMENDATIONS

Dynamically adjust clients' and prospects' investment holdings, recommend new investments or allocate new liquidity to multiple investment positions.

Add an Investment

Investments include fixed income, cash, derivatives, equities, and alternatives. An investment itself cannot own assets.

New Proposal

Patrick Helland | 2019-03-25

ASSET CLASS · SECURITY	ARGET ASSET CLASS ALLOCATION (%)
Cash & Cash Equivalent	0.00 %
Equity	40.00 %
Fixed Income	40.00 %
Hedge Fund	5.00 %
Private Equity	15.00 %
<i>Click ⓘ to allocate the amount</i>	
Total	100.00 %

COMMUNICATE PROPOSED CHANGES

Easily create customized, branded proposals with modern designs and appealing visualizations. Effectively communicate your recommendations and demonstrate the potential benefits to colleagues, clients or prospects.

