




# ORS Smart Wealth Management Reporting

SaaS or On-Premises Software Solution for Consolidated Global Wealth Reporting



**Multi-custodian data interfaces**



**Consolidated Performance AI-based Risk Analysis**



**Customizable Professional Reporting**

# Key Features



Main Swiss Custodians data-interfaces already available



Customizable data templates for manual input



Customer Global Wealth evaluation through data consolidation



Performance evaluation with contribution and attribution details



Risk metrics (KRI) with contribution details



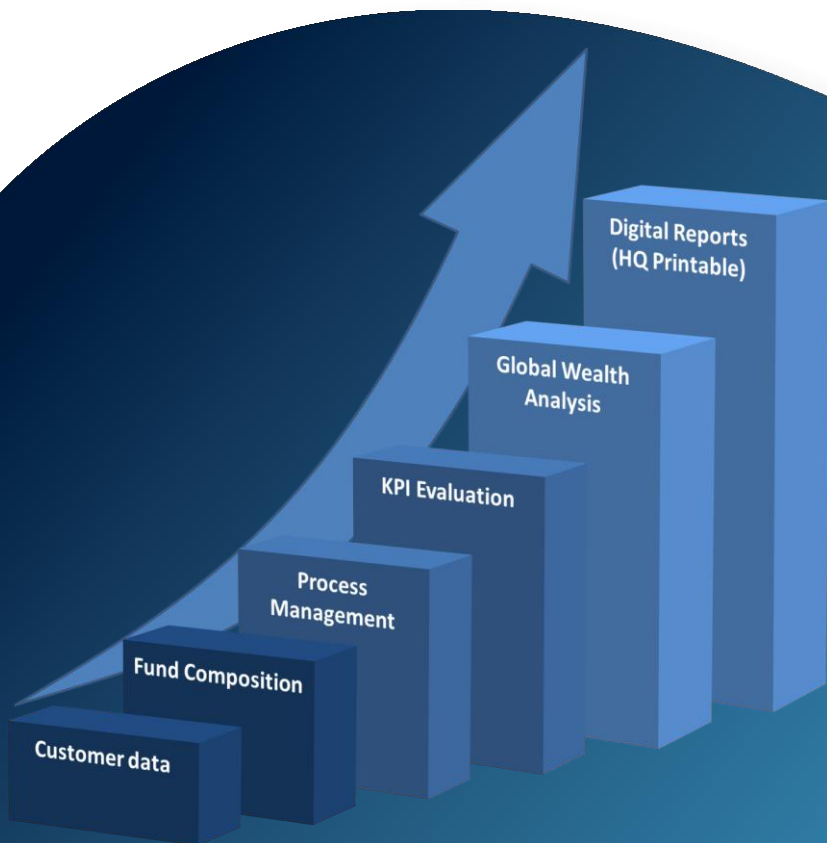
Customizable reporting through a modular approach



User web interface for process monitoring and data check



On-demand and batch production of high-quality printable reports



## A.I. as a Service

**ORS Smart Wealth Management Reporting** is the all-in-one solution that allows users to automatically collect, check and consolidate portfolios data provided by different Custodians, offering advanced analysis tools to both support compliance checks and fulfill the needs of producing complete and up-to-date digital reporting of Customers' Global Wealth

Contact us for a live demo! [sales@ors.group](mailto:sales@ors.group)

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