



FIS PROFESSIONAL PORTAL

The Digital Portal that Helps Investment Professionals Build Stronger Relationships

Today's competitive landscape can change on a dime, and brokerage firms must react just as quickly. Your investment professionals need fast and easy access to information, as well as tools that will differentiate their services. But to accomplish that, your data management strategy must evolve.

FIS® Professional Portal integrates all of your internal and third-party solutions, provides identity management of those solutions, satisfies regulatory requirements for PII data, and supports multiple user personas. It provides streamlined workflows,

relationship-level views and comprehensive trading features, enabling your investment professionals to increase their productivity and more effectively serve their customers. With its flexible user interface and configurable, data-driven dashboards, your team can focus on what's important to them and their clients.

And when you use Professional Portal in conjunction with FIS® Investor Portal, you'll also gain valuable insights into your customers' interests and activities. Now your investment professionals can truly understand their customers and build stronger relationships.



EMPOWER YOUR INVESTMENT PROFESSIONALS

Professional Portal combines data with enhanced workflows and actionable dashboards to provide your investment professionals with unmatched client-servicing functionality.



HARNESS THE POWER OF DATA

Uses data from multiple sources – including “golden copy” back-office data, third-party research content and best in class tools – to reveal customer books and records details, funds available for investment and withdrawal, account condition and portfolio exposure.



GAIN MORE VALUE

By combining data with configurable dashboards, Professional Portal gives you the ability to organize data, prioritize what's most important to you and your customers, and quickly act to gain a clear view into your customers' financial picture.

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DELIVER A MULTI-CHANNEL EXPERIENCE

Enjoy immediate, “always on” access to information from any of the devices you choose, delivered with unmatched speed and flexibility.

LEVERAGE MODERN DESIGN

Professional Portal delivers a consistently robust user experience, presenting information in configurable dashboards. It offers numerous quick navigation features, integrates with many best-in-class vendors and simplifies the account enrollment process.

ENJOY THE LATEST TECHNOLOGY

Professional Portal uses modern technology and tools and is delivered in a fully hosted environment, helping you to leverage the right data and comply with the latest regulations.

REDUCE YOUR COMPLIANCE BURDEN

Ease the weight of managing data, reporting and communication with various regulators, so that you can focus on differentiating your offerings and providing more value to your customers.


CUSTOMIZE YOUR DATA

Cost-effective and flexible access to real-time data can accelerate the response times of your applications and make it even easier to customize your data, resulting in an all-around improved user experience.

Empower your investment professionals.

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