

The Best Reporting Solution.

Give your investors the Wealth Clarity™ they need.

Private Client Resources (PCR) was named “Best Reporting Solution” in the prestigious 2015 PAM Awards.

With more than 14 years of expertise, PCR pioneered today’s outsourcing model of consolidated reporting.

Consistently recognized by the private wealth management industry for its reporting and technology innovations, PCR provides comprehensive data aggregation of all asset classes, including private equity and hedge funds.

PCR delivers its white-labeled products and solutions to leading family offices, private banks and RIA firms.

Improve the Way You Work

- Freedom from work and worry
- Spend time on what matters most

Produce More with Less

- Focus on revenue producing activities
- Improve efficiency
- Reduce overhead costs

Add to Your Capabilities

- Advise on client’s 360° Total Wealth View
- Deliver high quality, accurate reports
- Access to superior analytical tools and technology

Reduce Risk

- Answer investors’ “Big 3” questions:
 - “Where am I?”
 - “How am I doing?”
 - “What are my risks?”
- Alleviate dependencies
- Reduce errors (99.7% data accuracy)

To learn more about PCR’s award-winning capabilities and services, contact Gregory Roll, Director of Branding & Marketing, at (203) 210-0047 or groll@pcrinsight.com.

www.pcrinsight.com



WE DO THE WORK™