Portfolio**Aid**

2022 INDUSTRY AWARDS

WealthTech100 Innovation Leader
- FinTech Global

WealthTech Service Provider of the Year (Excellence Awardee)

- WP Awards in partnership with WP Canada



SECURITY RATINGS

Risk ratings & investment objectives for all asset classes



KYP & KYC SUITABILITY

Portfolio suitability monitoring and alerting



CASE MANAGEMENT

Centralized dashboard for issue tracking and remediation



T1 & T2 SUPERVISION Alerts, exception reports, and supervision delegation



FACT SHEET POS

Fund and ETF Facts point of sale delivery



CFR READY

KYP comparison, monitoring and enhanced concentration testing

PortfolioAid 360	NewCo Securities 👻 💄 bparker English - EN 👻
Insight 360 Senior JOHN SMITH AML (Here Age 33 / Time Horizon 6-3 Years / Knowledge Goed / Income: NA / Spousal Income: \$76K / Fixed Assets: \$100K / Liguid Assets: \$100K / Lig Overview Portfole (s) Notes (t)) CONTROLLER INCLUSE PEPARIO INCL RISK CAPACITY ~ Abilities: \$59K / / Net Worth: \$310K
Product Suttability A Sector Summary Total: 5120.38.41 Sector	Allocation C Hide unassigned
© Early 42.34% \$45,221.82	Basic Material 1.9% 52,394.73 Communication Service 10.46% 512,857.00 Transcript Services 16.3% 16.552.08 Financial Services 36.5% 64,528.79 Unassigned 27.66% 545,319.48

Intelligent Wealth Compliance Solutions for IIROC Dealers

PortfolioAid360 -> Central compliance management Insight360 -> Suitability insight & modeling Inform360 -> Fund Facts e-delivery KYP Monitor -> Significant change monitoring KYP Compare -> Product peer comparison

