

## Platinum Toolkit- Student Version

The fi360 Toolkits are designed to help investment professionals manage a prudent investment process and deliver clients a fiduciary standard of care defined in the [Prudent Practices for Investment Fiduciaries](#) handbook series. Upon registration for one of fi360's Training programs, you will receive access to the Platinum Toolkit-Student Version.

### With the fi360 Platinum Toolkit, you can:

- Write customized Investment Policy Statements that integrate with your Client's Monitoring Reports
- Automatically monitor your client's investments and watch list
- Access the fi360 Fiduciary Score™ on thousands of mutual funds and ETFs
- Search and screen for mutual funds, ETFs, separate accounts and annuities
- Utilize New Frontier Advisers' patented Resampled Efficiency™ technique
- Produce customizable, FINRA-reviewed client reports
- And much more!

### The core tools and their functions...



#### My Client Manager

**Functions:** Store customer information, establish an asset allocation, generate an Investment Policy Statement (IPS), enter holdings, manage the Watch List and create a variety of custom reports.

**Fast Facts:**

- Follows the Investment Management Process outlined in the [Prudent Practices for Investment Fiduciaries](#) handbook series
- Customizable IPS Watch List Process
- Reports include the Monitoring Report, fi360 Fiduciary Score™ Breakdown, Plan Snapshot, Flash Report, Proposal Report and more
- Unlimited client storage and report generation
- Designed and customized for Retirement Plans, Individuals, Trusts and Foundations/Endowments



#### Investment Analyzer

**Functions:** Dynamically create and save complex searches, produce detailed Investment Profiles, Comparison Reports, Snapshot Reports, Data Exports and much more.

**Fast Facts:**

- Data is sourced from Morningstar on a quarterly basis.
- Mutual Fund/ETF, Separate Account and Annuity Databases
- Numerous investment search factors and thresholds are available, including the fi360 Fiduciary Score™
- Upload a custom universe or platform



#### Asset Allocation Optimizer

**Functions:** Dynamically move across the Resampled Efficient Frontier™ (REF) to create optimal allocations, or manually enter existing allocations to compare against the REF.

**Fast Facts:**

- Resampled Efficiency™ (RE) is a patented process developed by New Frontier Advisors, LLC.
- Results in more realistic use of investment information and more effective asset allocations by treating risk-return estimates consistent with investor uncertainty.
- RE is the only provably effective portfolio optimization procedure in the world today, outperforming traditional optimizers in rigorous statistical tests.

## Platinum Toolkit-Student Version Features

- Access for 180 days to the Platinum Toolkit
  - View the [Toolkit Comparison Matrix](#) on the fi360 website for a complete listing of the Platinum Toolkit features.
- Receive a \$165 credit on your Platinum Toolkit subscription by making a payment before the end of your Student trial!
- The following restrictions are enabled in the Student Version until you subscribe.
  - Clients: 5 maximum
  - Report generation: 50 maximum
  - Student Trial disclosure included on all reports