



BETTER INTELLIGENCE FOR BETTER DECISION-MAKING

The more complex your family's financial arrangements, the more vital it is that you have clear, accurate and up-to-date information on which to base your key decisions. Stonehage Fleming Expert Reporting uses a proprietary software system to generate customised reports that enable you to analyse assets across currencies, sectors and jurisdictions as well as beneficial ownership and liquidity profiles.

THE DETAIL YOU DEMAND

Our system allows your whole family or any sub-group or individual decision-makers to access consolidated reporting for everything from strategic overviews to fine-detail analyses.

If you are using the Stonehage Fleming Dealing & Treasury platform or our core banks, data accumulation is automatic. You get up-to-date reporting on all your assets whether they are financial or non-financial.

The reports include liabilities to add another dimension to your planning capability.

We can work with you and your investment advisers to identify benchmarks or other performance criteria and implement monitoring across any asset class and for any asset or portfolio. Standard benchmarks or appropriate composites can be applied wherever required.

THE SECURITY YOU WOULD EXPECT

We have drawn on over forty years' experience serving wealthy families to hone our reporting systems into what we believe are uniquely useful financial management tools.

And it should go without saying that the privacy and security of our clients' data is paramount. Rigorous internal procedures are in place to ensure the proper and secure storage and distribution of all your most sensitive information.

ONLINE AND MOBILE REPORTING

We offer an array of online and mobile reporting solutions specifically catering to the individual needs of our clients. Whether the focus is purely on investments or on the broader consolidation of wealth, we have the appropriate solution. The offering can also be enhanced by loading additional third party managed investment mandates and non-bankable or personal assets.

In addition we offer highly customisable online wealth analytics to clients that require a more complex reporting solution.

The user experience has been designed to be simple and intuitive making it easy for our clients to access their information wherever they are.

MAKING THE COMPLEX SIMPLE

However you wish to work with us, you will always have a principal point of contact. This makes your relationship with us simple and straightforward, and ensures that the management of individual aspects of your family's finances is always considered in the context of your broader arrangements.

To find out more, simply contact your Stonehage Fleming adviser
email: enquiries@stonehagefleming.com or visit: stonehagefleming.com

