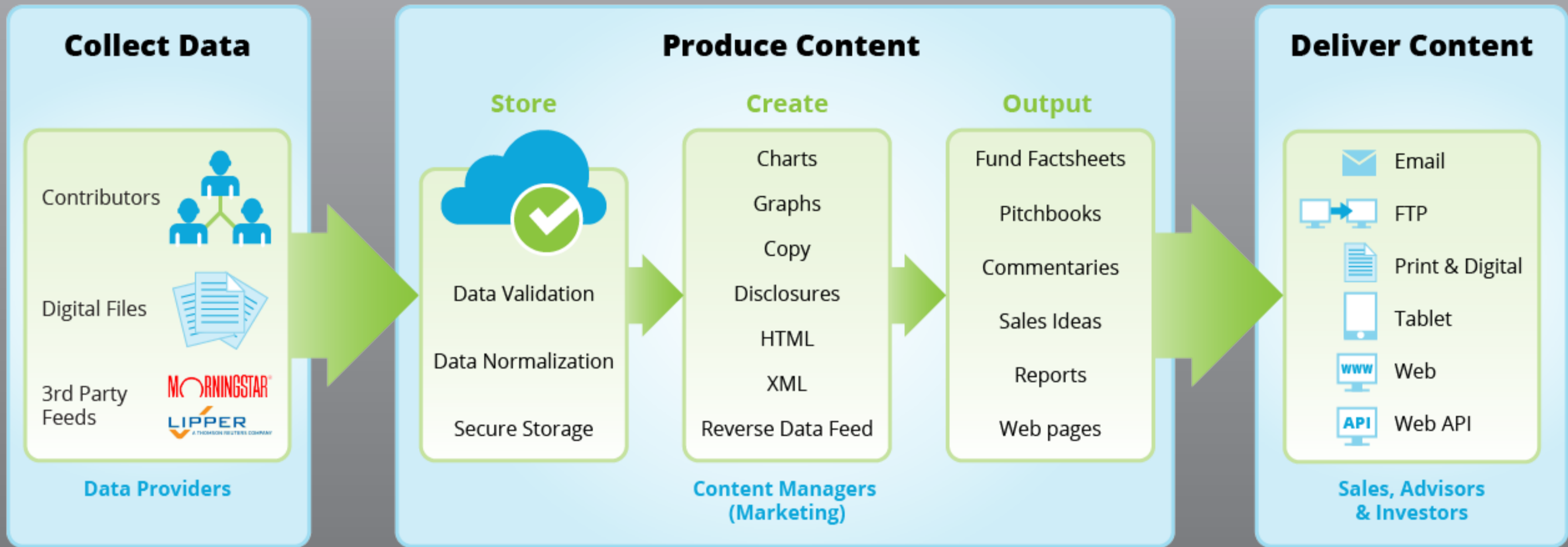# Data & Content Automation
For Investment Companies

Consistently deliver timely marketing materials that are accurate, on-brand, and compliant.

"Using Synthesis, we are the 2nd-fastest asset manager in the world at releasing updated marketing materials at quarter-end." *– EVP Global Marketing Ops, for a tier-one global asset manager, November 2017*

Synthesis®

Go-to-Market Faster, Grow AUM

Manage data, documents, and delivery all within one platform

Collect Data

Contributors

Digital Files

3rd Party Feeds

MORNINGSTAR

LIPPER A THOMSON REUTERS COMPANY

Data Providers

Produce Content

Store
- Data Validation
- Data Normalization
- Secure Storage

Create
- Charts
- Graphs
- Copy
- Disclosures
- HTML
- XML
- Reverse Data Feed

Output
- Fund Factsheets
- Pitchbooks
- Commentaries
- Sales Ideas
- Reports
- Web pages

Content Managers (Marketing)

Deliver Content
- Email
- FTP
- Print & Digital
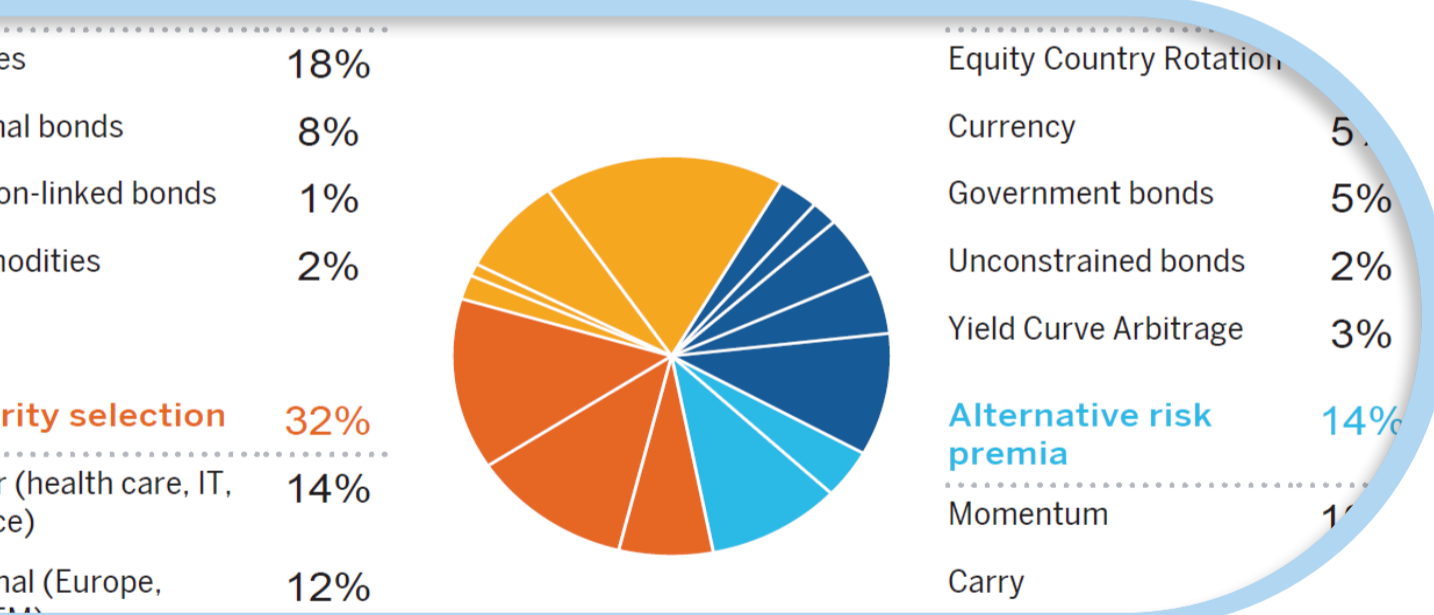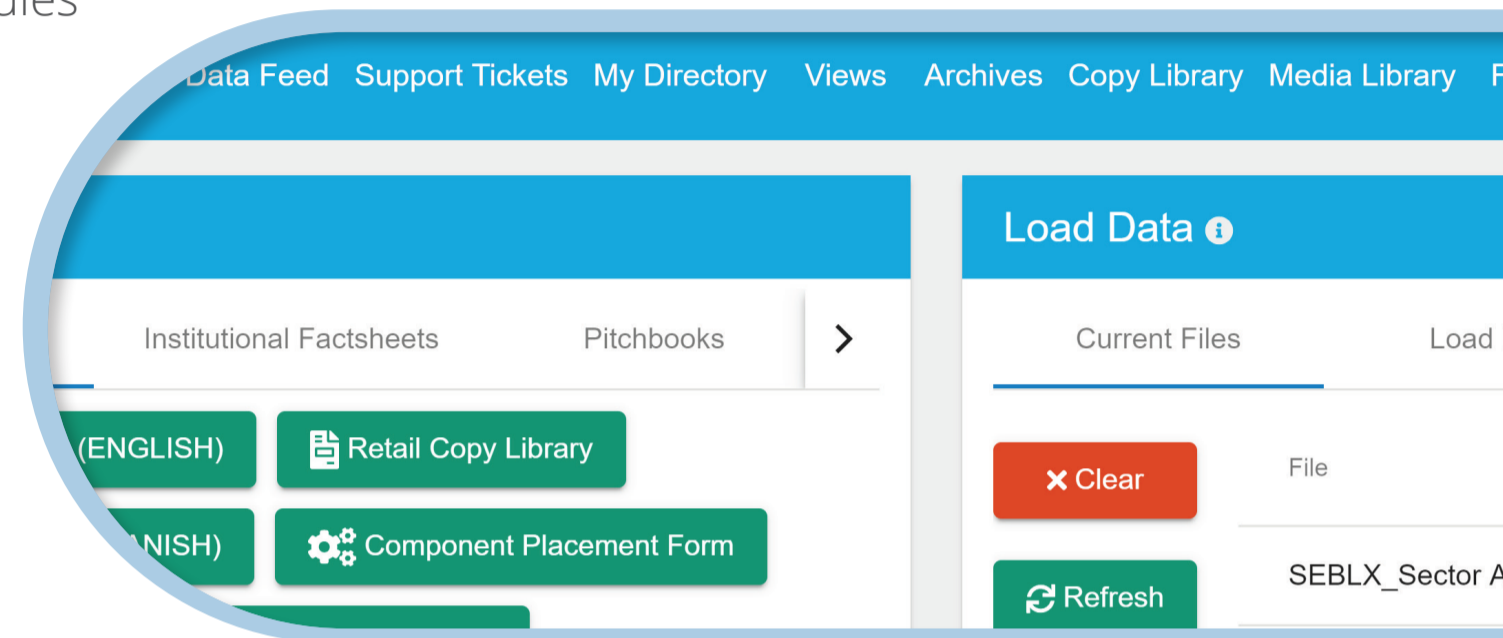- Tablet
- Web
- Web API

Sales, Advisors & Investors

Synthesis provides a robust automation platform along with professional services to help asset managers create and deliver marketing content more efficiently. We start by aggregating disparate data sources and normalizing, validating and centralizing product data into our secure data warehouse. The clean data is leveraged to render charts, graphs, and copy that is used to produce a variety of marketing communications from fact sheets to web pages to newsletters. Content is distributed to print vendors, websites, and sales enablement platforms to get communications into the hands of investors and the sales force quickly. By tailoring our solution to firms' specific needs, Synthesis helps asset managers get exactly what they need in order to reduce operating costs and grow AUM.

Bring Your Challenges

Content Management & Automation

- Automate production of custom, client-specific documents using business rules
- Add disclosures, remove certain data points, and display the data the way you want from quarter to quarter
- Share data and content across channels - retail, institutional, retirement, etc
- Add or adjust benchmark comparisons by component, share class, or fund
- Control where components appear on the page
- Edit any copy that appears on the page
- Translate into any language
- Receive single & integrated outputs for print and web usage
- Manage multi-page table flows and footnotes
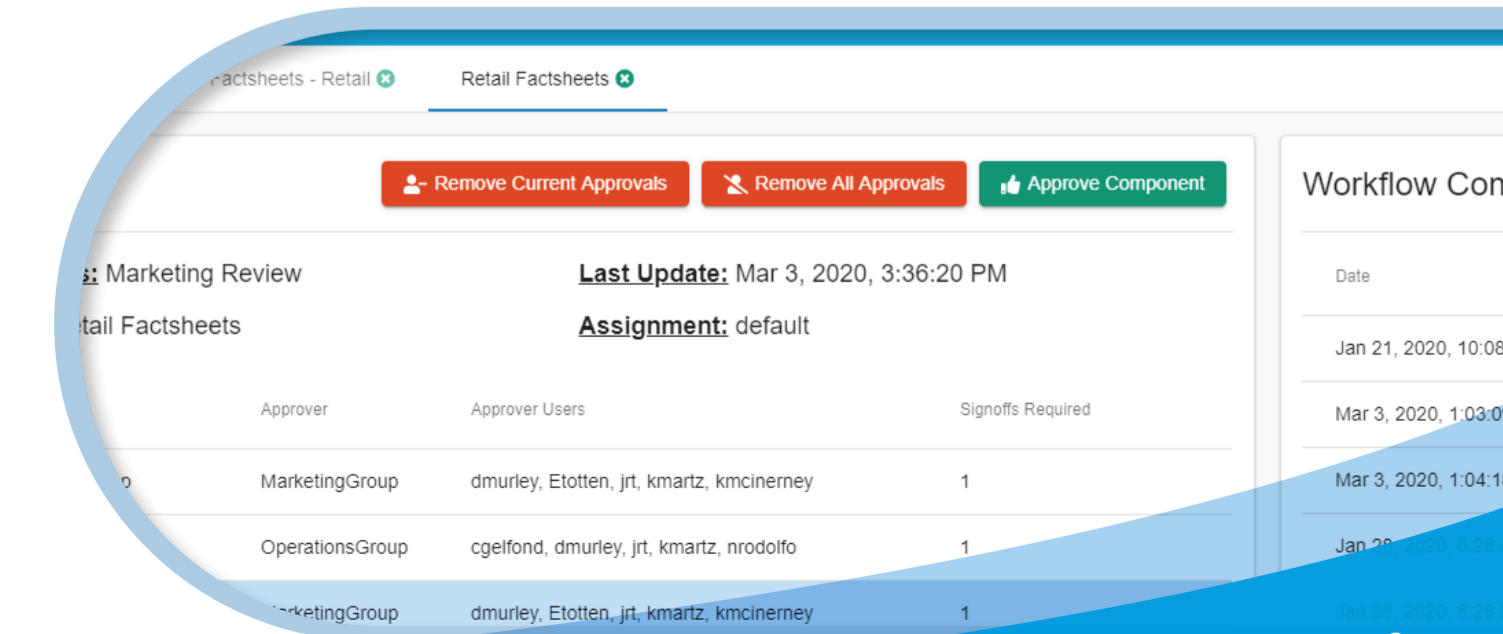- Send documents anywhere upon approval

Data Management & Visualizations

- Proprietary rendering technology can automate any kind of custom chart or graph to the client's exact specifications
- Deliver any type of data feed(s) or file(s) by automated feed, email, or FTP.
- Documents are rendered immediately after data arrives
- Advanced validation rules check for common errors
- Errors are immediately flagged for quick resolution
- Push a reverse data feed to any downstream system or process

Compliance & Approval Management

- Rules-based disclosure engine can be processed to client specs
- Control when and which disclosures appear on your documents
- Automatically update disclosures everywhere they appear
- Automatically tag any kind of PDF document for ADA compliance
- Set up custom approval workflows, based on client requirements
- Full audit trail of changes and approvals

Why Synthesis?

Synthesis is more than just an automation platform.

We're a team of automation experts who understand the challenges of getting data-heavy marketing content into the hands of clients, prospects, and investors quickly.

We're a team of go-getters who work tirelessly to ensure our clients' goals and expectations are met.

We're marketers, project managers, engineers, and creative thinkers who love to solve problems and achieve results for our clients.

We are a team of consultants who analyze our clients' data, content, and processes to create highly efficient and cost-effective solutions that rival our competitors.

We're on your team. Only a phone call or an email away at any given moment. To help you troubleshoot an error, optimize your solution, or create something new. Think of us as an extension of your team, using our 20+ years of experience in this business to help you meet your time-to-market goals, SLAs, reduce operating costs, and grow AUM for your firm.

Security & Reliability

We place a focus on data security.

The Synthesis Platform is architected and deployed to minimize security risks. Our approach to Information Security is to follow ISO27001 security standards. Synthesis is subject to several Information Security audits a year by our clients. In addition, network security testing is performed on an annual basis by qualified outside parties.

The Synthesis Platform is developed and administered by a tightly organized service team which is intimately familiar with our clients and their users and projects. Ongoing security awareness training is part of our client service culture.

- **ASP Solution Model**
- **Independent Data Servers with Isolated Transactions**
- **SAML 2.0 compliant**
- **Native customer's iDP integration**
- **Federated Single Sign-On support**
- **Multi-Factor Authentication support**
- **System analytics for auditing purposes**
- **Encrypted communications using TLS 1.2 and 1.3**

Trusted by Investment Companies

"Synthesis is an amazing partner: supportive, patient, and proactively helping us meet our targets."

— VP, Marketing Operations for a mid-tier Global Asset Manager | August 2018

THE INVESTMENT INDUSTRY'S LEADING CONTENT AUTOMATION SOLUTION

Proven Success

We've been serving the financial services industry exclusively for over 20 years. 100% of our clients are investment firms, including asset and wealth managers, TAMPs, and insurance companies. Our clients select us for our reputation and stay with us for our industry expertise and excellent client service.

Synthesis Technology
135 South LaSalle Street, Suite 2025
Chicago, IL 60603

Professional Implementation

Our client implementations are turnkey. This means our professional services team does the heavy-lifting to set-up, test, and deploy each client's automation solution. We work closely with our clients to ensure the implementation completed quickly and within budget. We look forward to serving you!

READY TO GET STARTED?

Get in Touch Today

Synthesis®