

THOMSON ONE WEALTH SELECT

SEAMLESSLY POWERING YOUR BUSINESS



Thomson ONE Wealth seamlessly combines our industry-leading global market data and news with our sophisticated investment selection and proposal generation tools, to simplify complex workflows and enhance your productivity.

Advisors will be able to offer more value to clients and manage their business more effectively using content and tools that make it easy to identify suitable investments, generate multi-asset proposals, validate recommendations and track portfolios. All of these tools are integrated into Thomson ONE Wealth Select and designed to work together in one, intuitive solution.

AN ALL-IN-ONE SOLUTION FOR YOUR BUSINESS

Thomson ONE Wealth Select will allow your firm to streamline its operations with a single solution to address key elements of the advisor workflow. Investment selection and proposal generation are at the heart of what advisors do, so providing an integrated solution will not only demonstrate your commitment to their success, it will save them time, help them sell products and enable them to serve their clients better.

PROPOSAL GENERATION

Your client's needs are becoming increasingly complex. Helping them achieve their goals requires deeper analysis of their entire portfolio and available investments. But this kind of analysis can take hours without the right tools. Our proposal generation tools allow you to effectively illustrate your recommendations and turn them into actionable plans in no time.

You'll be able to:

- Create an investment roadmap for your clients in less time by eliminating the need to work across multiple applications
- Use our Product Catalog to quickly filter, compare and select suitable securities and investment products for your clients.
- Access Thomson Reuters comprehensive database of mutual funds, exchange traded funds, closed-end funds, variable annuities and stocks, along with a robust separate account database, provided by Prima Capital®.
- Quickly create a complete, multi-asset proposal that your clients will find easy to follow and understand.

INVESTMENT SELECTION AND ANALYSIS

Thomson ONE Wealth Select offers StockReports+ and Lipper fund information, to enhance your analysis and validate your recommendations.

StockReports+ is our security-specific analysis and report generation tool which includes a proprietary stock rating that can be used to further optimize your equity investment selections and objectively support your recommendations. These reports exceed the breadth of coverage and detail offered by many competitor products, with enhanced analysis of security pricing, valuation and fundamental metrics relative to actual market performance.

Features include:

- A quantitative, transparent and easy-to-understand scoring system
- Coverage of nearly 25,000 equities in 17 countries.
- Six Component and Average scores that are calculated and issued weekly.

Lipper fund data and Lipper Leaders fund ratings will help move the discussion beyond basic performance by allowing you to illustrate how and why a particular fund is suited to a specific investor's goals. You can identify mutual fund and ETF investments by screening Lipper data covering nearly 20,000 fund investments in North America.

The Lipper Ratings provide a view of a fund's success in meeting certain goals such as preserving capital, building wealth, tax efficiency and minimizing expenses. And the Lipper Fund Awards designations highlight funds that have excelled in delivering consistently strong, risk-adjusted performance, relative to peers.

THOMSON ONE WEALTH SOLUTIONS

Thomson Reuters offers a complete suite of wealth management solutions that allows you to unlock competitive advantage by making it easier for you to effectively manage your business and for your advisors to capitalize on the full depth of their expertise.

Thomson ONE Wealth

– an advanced market data application providing robust market and news coverage.

Thomson ONE Wealth Select

– pairs industry-leading market data and news with our investment selection and proposal generation tools.

Thomson ONE Total Wealth

– our complete range of integrated, scalable solutions designed to seamlessly connect your entire organization – from front to back office.



HYPOTHETICAL ILLUSTRATIONS

Visual depictions are a proven method for quickly and effectively communicating complex ideas. The hypothetical illustrations capability in Thomson ONE Wealth Select helps you communicate your investment recommendations by enabling you to demonstrate how a single security, a portfolio or a comparison between two securities, would have performed over a historical time period. You can produce investment illustrations and generate detailed security profiles which you can share with your clients. In addition, you can include investment strategies, standard or custom fee structures and taxes.

For more information:

Send us a sales enquiry at:

financial.thomsonreuters.com/sales

Read more about our products at:

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