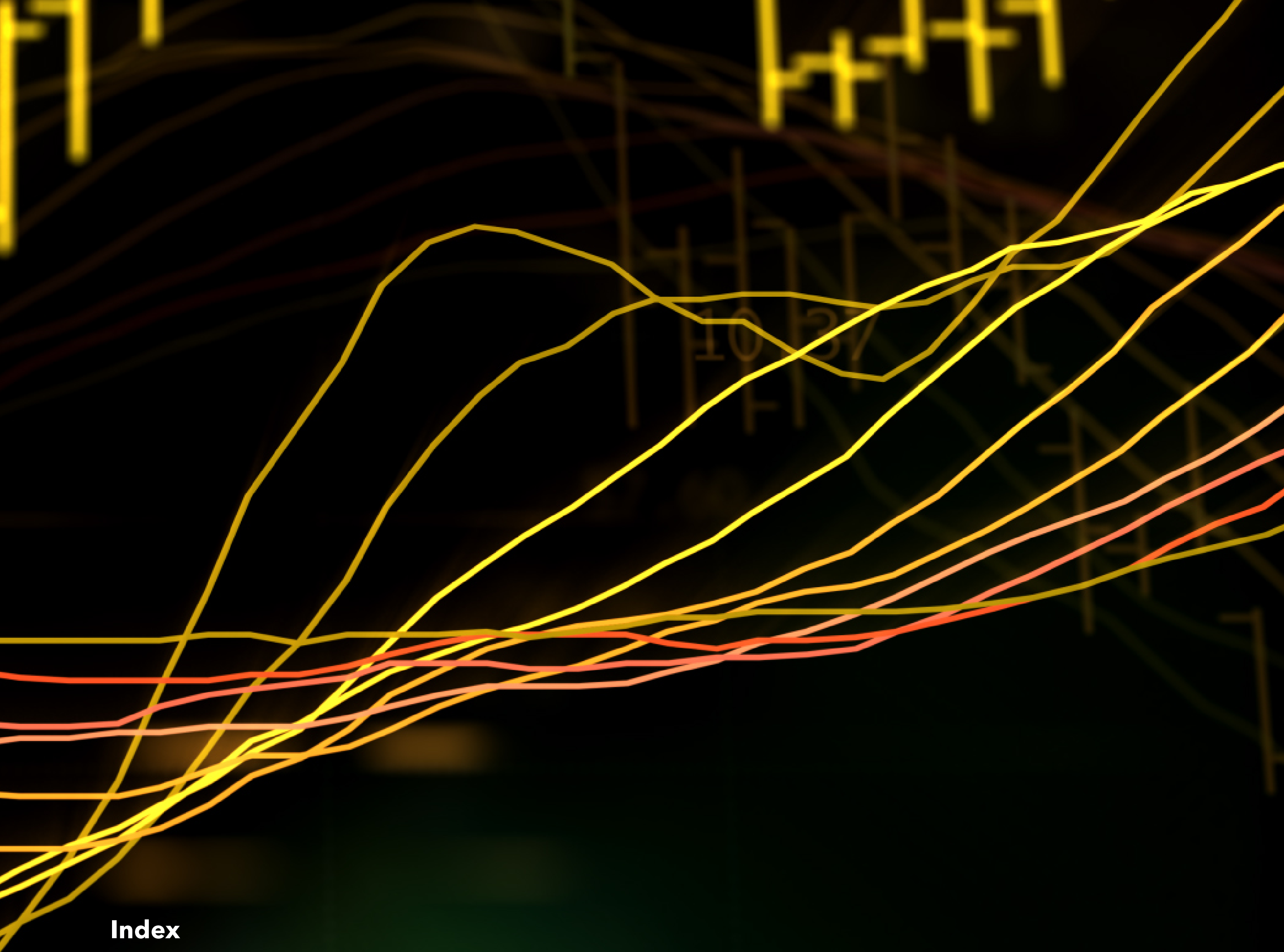
Bloomberg solutions for private wealth advisors

Bloomberg Terminal

Overview

Bloomberg



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Creating value for you and your clients

As a private wealth advisor, the planning and performance of your portfolios is of utmost importance to the reputation and strength of your business. What sets your business apart from the competition is the quality of information you provide and insights you offer. From the macroeconomic forces that shape the markets to the corporate actions behind the earnings estimates of individual companies, the Bloomberg Terminal® will keep you on top of what is happening and why and provide you with the resources and tools to keep you ahead of the game.

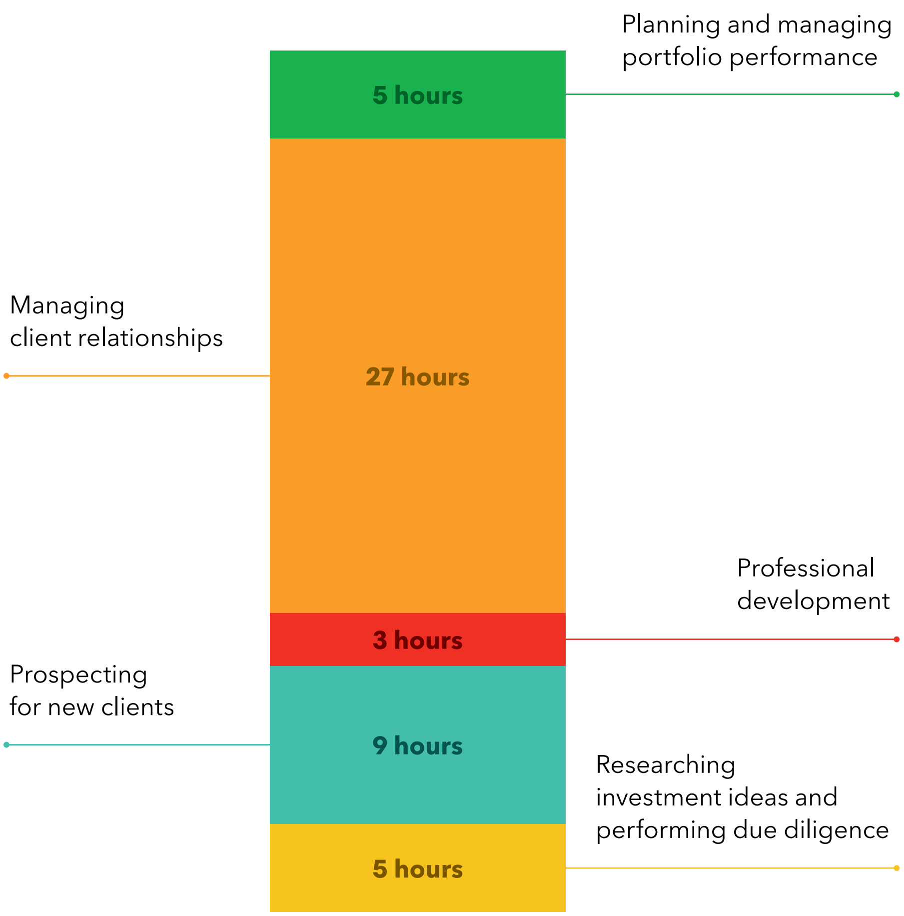
When crafting a pitch to potential or existing clients, the quality and value of this information can turn your pitch from competent to compelling, with Bloomberg behind you all the way.

What it takes to keep your business growing

The work you do every day is not a linear process – clients expect you to be an expert at multi-tasking to be able to meet their wealth management goals.

So, you should have the resources and tools to help you achieve optimal performance.

Hours spent by the typical financial advisor across various weekly tasks



Managing client relationships

Out of an estimated 49 hours a week, the average advisor spends 27 hours managing client relationships: nine hours per week meeting with existing clients, five hours preparing for meetings, seven hours supporting financial planning, investment and other analytical work and six hours on client servicing tasks. You are a master at managing your client relationships — we can help make the rest of your week more efficient by helping you to:

- Educate your clients on key trends and issues that impact their investments (e.g., the Coronavirus, geopolitical unrest, etc.)
- Prepare for meetings with Microsoft® Excel and Powerpoint templates that bring together our data and analytics
- Answer questions with insights derived from a network of more than 250 experienced research analysts

With Bloomberg, we help you save time so you can focus on what matters most for your clients.

Prospecting for new clients

Your business remains a leader in the private wealth field by being able to generate new business. To stay relevant, you need the tools to stay at the forefront of generational shifts. We can help you:

- Quickly identify liquidity events by individuals and originating from companies.
- Create comprehensive prospect lists in your region.
- Identify management, board members and insiders in your company list.

On the Terminal, you can screen through our network of individuals and set alerts for job changes and other movements within and between companies.

Search for prospects by title and location in your region.

Sample M&A deal list for private equity or venture capitalist in California.

Researching investment ideas and performing due diligence

Through market ups and downs, clients look to you to find opportunities that help them build and protect wealth and plan for retirement. We can help keep you consistent with these shifts in investment goals by providing:

- Price discovery and idea generation
- Comprehensive fixed income coverage with screening, PD and yield analysis
- Real-time newsfeeds, market surveillance and alerts
- Robust unbaised research on corporate, industrial and export topics
- Management capabilities for research on industries, companies and expert topics

With Bloomberg, you can access timely news and data that is designed to forefront the information most relevant to you.

Staying in tune with investor's ESG goals

A new generation of investors want advisors to help bring more balance to their portfolios, keeping diversity and environment, social and governance (ESG) goals in mind.

To keep up with investor expectations:

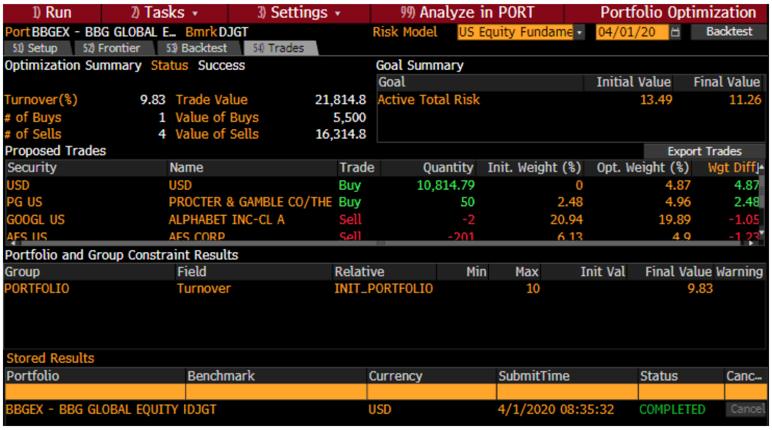
- Access to more than 13,000 companies
- Up to 12 years of history for over 900 fields is available as an Enterprise Data feed
- Fully integrated feature of the Bloomberg Terminal
- Use our ESG performance scorecard to generate custom, transparent ESG scores to understand company and portfolio ESG performance for any Equity or Corporate Bond Portfolio. Scores are calculated based on company performance on the Environmental, Social and Governance pillars.

Planning and managing portfolio performance

Clients prefer human advisors to robo-advisors. Human advisors – you – can provide a customized approach to shaping a client's investment portfolio and investment flexibility. Clients rely on your expertise and track record to help them invest mindfully and prudently to reach their goals. To make sure you can deliver the value that robo-advisors can't, you need resources that:

- Look at portfolio characteristics, holdings and more
- Run optimization and attribution scenarios for prospecting efforts
- Examine the historical cumulative performance of your portfolio relative to its benchmark
- Use news heat indicators to quickly identify the stories with the most impact on your portfolio

With Bloomberg, you can plan and manage your portfolio in a way that suits your clients' needs.



Example of portfolio optimization.

Professional development

Your business won't grow unless you grow. Access to thought leadership, training and tools can help keep you relevant and find more clients for decades to come.

- Demonstrate the continued value of your investments.
- Learn more about a topic or theme that investors are interested in.
- Stay up to date on regulations that will impact your day-to-day business.

With Bloomberg, our training and tools can help you keep growing.

Tools and resources

An advisor of your caliber should have access to the tools and resources that will help you continue to be successful.

Learn more about the benefits of having access to your own dedicated Terminal at bloomberg.com/Terminal, select 'Request a Demo' and set up an appointment with a Bloomberg representative.

Prospecting for new clients

- **PE <GO>** Private Equity
- **MA <GO>** Mergers & Acquisitions
- **IPO <GO>** Equity Offerings
- **PSCR <GO>** Private Company Screening
- **MGMT <GO>** Company Management
- **EQS <GO>** Equity Screening
- **BIO <GO>** People Profiles
- **HDS <GO>** Security Ownership
- **PEOP <GO>** People Search
- **ALRT <GO>** Alerts Manager

Researching investment ideas and performing due diligence

- **BI <GO>** Bloomberg Intelligence
- **SRCH <GO>** Fixed Income Search
- **Launchpad <GO>**
- **DS <GO>** Document Search
- **NEWS ON ___ <GO>** News Search
- **DAYB <GO>** Daybreak
- **QUIC <GO>** Bloomberg Quicktakes
- **FSRC <GO>** Fund Screening
- **FSCO <GO>** Fund Scoring
- **HFA <GO>** Hedge Fund Analysis

Planning and managing portfolio performance

- **PORT <GO>** Portfolio & Risk Analytics

Managing client relationships

- Bloomberg BRIEFs
- **QUIC <GO>** Bloomberg Quicktakes
- **BI <GO>** Bloomberg Intelligence

Professional development

- Bloomberg webinar portal (Visit Bloomberg.com/professional, under Insights, under Features and select Webinars)
- **SEMR <GO>** Seminar Administration
- Access our 24/7 Support Service
- Personalized training can also be requested from your Bloomberg Account Manager

About the Bloomberg Terminal.

Since 1981, business and financial professionals have depended on the Bloomberg Terminal® for the real-time data, news and analytics they need to make the decisions that matter. The Terminal provides information on every asset class — from fixed income to equities, foreign exchange to commodities, derivatives to mortgages — all seamlessly integrated with on-demand multimedia content, extensive electronic-trading capabilities and a superior communications network.

Take the next step.

For additional information, press the <HELP> key twice on the Bloomberg Terminal®.

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