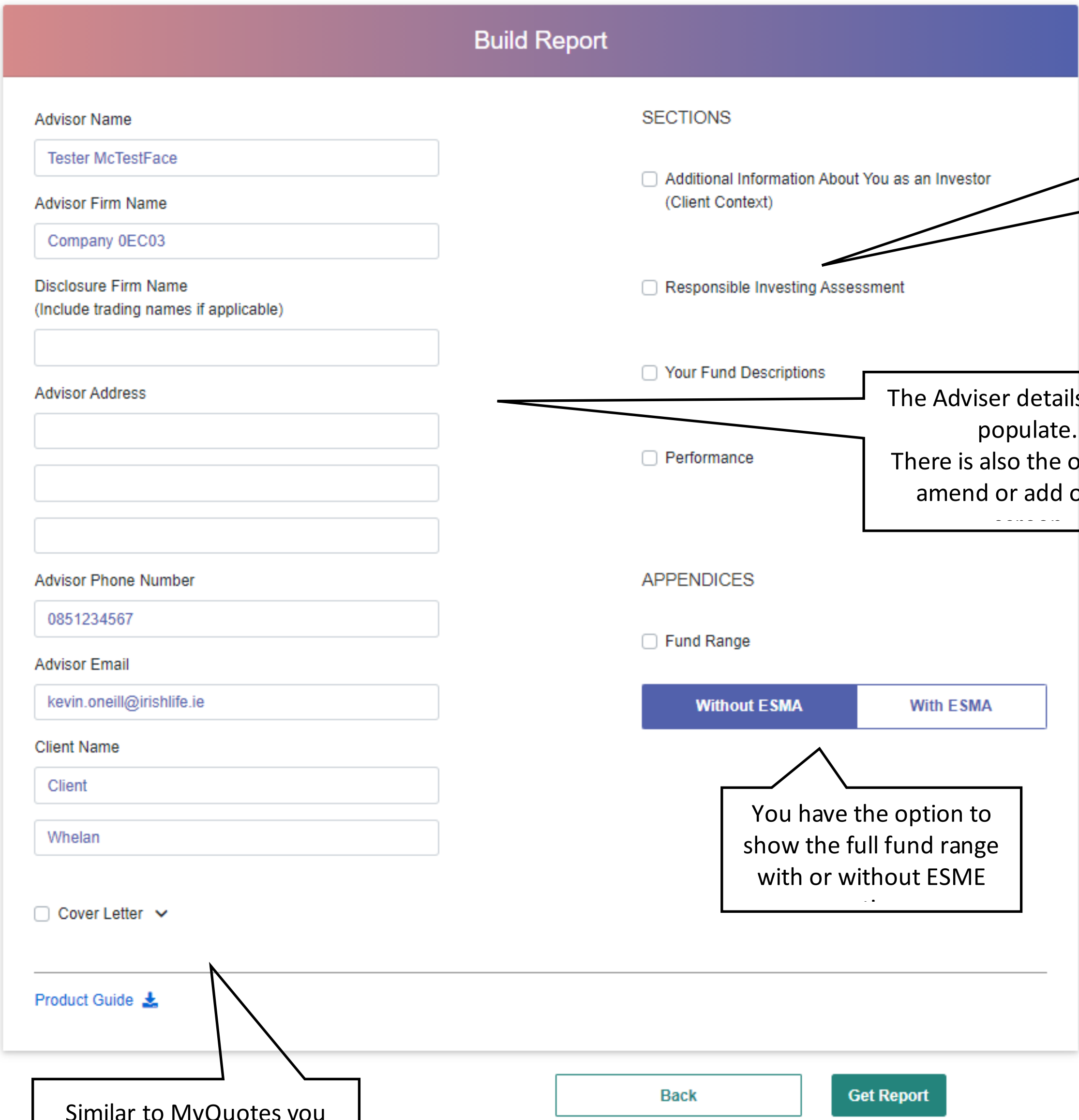
# REPORT GENERATION

**Our report wizard will help you build out your bespoke report tailored to your advice and client**




The report is dynamic you can pick the sections you wish to include in the report.

The Adviser details will pre populate.
There is also the option to amend or add on this

You have the option to show the full fund range with or without ESME

Similar to MyQuotes you can also include the cover letter, fund factsheets & product guides

Once you have created your report – select **Get Report**

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**<u>MyPortfolio Builder Professional Reports</u>**:

- Bespoke Broker Branded – Tailored to your advice and Client
- Dynamic Text for product – Report name, risk ratings and Investment Managers
- Detailed asset level look-thru
- Funds displayed in graphical and tabular form for maximum impact
- Complements MyQuotes, MyRevMax and MyRetirement Pathfinder