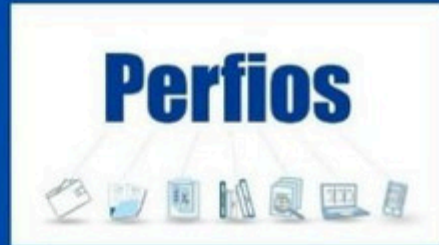




5 Benefits of using Perfios Money Manager

5 BENEFITS OF USING PERFIOS MONEY MANAGER



The Perfios Finance Manager (PFM) is industry's leading personal finance manager application that helps your customers manage their finances in one place, providing the financial institution, like you, and your customer a 360-degree view in a single dashboard.



Increased Customer Satisfaction & Stickiness

360-Degree View of Customer's Portfolio



Offers Better Advisory Services

Leverage the insights To



Optimize New
Product/Services Offerings



Targeted Cross-Sell and
Up-Sell Opportunities

Perfios offers the best money management software for financial advisors. Our software is easy to use and helps you stay organized with your finances.



Perfios offers the best [personal financial management](#) software for financial advisors. Our software is easy to use and helps you stay organized with your finances. Our software provides advisors with powerful tools to help them manage their clients finances and grow their business.