



## ABOUT THE FIRM

As an investment division at a commercial bank, the team is in charge of creating an investment approach that favors their client's needs. The firm focuses on providing client solutions such as portfolio insights and market data along with managing their investments.



### THE CHALLENGE

- Need for an affordable, competitive, and well-rounded solution
- Unconsolidated research process
- Lack of communication with technical support



### THE SOLUTION

- Personalized workflow with end-to-end support
- Awareness of investment-defining events with Microsoft Outlook
- Relevant news information filtered intuitively



### THE RESULTS

- Increased confidence in sharing market findings
- Launched client content resource using StreetAccount insight
- Gained a competitive edge with flexible, tailored solution

# Investment Division at Commercial Bank Enhances Client Services with FactSet's Solutions for Wealth Managers

FactSet's comprehensive wealth management solution provides resources for banking firm to manage investments and communicate portfolio insights with its clients and prospects.

### THE CHALLENGE

The managing director and vice president/portfolio manager in the investment management division at a commercial bank needed to competently make connections between market events and investment decisions for their clients. Having an investment strategy that favored large cap equities and fixed-income instruments, the firm required a solution with deep financial data for multiple asset classes, company research, and real-time market information. The team aspired to have confidence in their investment strategies and effectively communicate portfolio insights to clients and prospects.

## Leveraging StreetAccount news along with FactSet's company and economic content, the firm now writes quarterly newsletters that intelligently provide insight into current market conditions and client's portfolio exposures and performance.

Initially, the firm switched data providers with the hopes of finding a market data solution that fit their requirements for investments and information along with their budget. Although the provider they chose was affordable, the solution left the team having to search externally to find further data to supplement their research process. Additionally, the offering was rigid and not proactive in supporting the firm with technical issues and other questions, resulting in the team struggling with communicating long-term plans.

### THE SOLUTION

After running a complimentary 30-day trial of FactSet's system, the team realized that FactSet offered an affordable, personalized workflow that adapted to their needs and could evolve as the organization grew. The bank's transition to FactSet was seamless with the guidance of FactSet's support team that provided continuous on-site assistance with trainings and project work to ensure a smooth implementation.

The team instantly reaped the benefits of FactSet by gaining access to key information during earnings season. With over 18,000 companies and events covered, FactSet's events calendar ensured that the team never missed information that could impact investment decisions. Integration with Microsoft Outlook put the details of those events at their fingertips whether in the office or on the road.

Monitoring and filtering market news and information became a breeze with FactSet StreetAccount. It allowed the team to remove noise from irrelevant news sources and receive curated topics that mattered most to them. The firm leveraged the fact that StreetAccount actively monitors headlines and intuitively provides information in a digestible format.

### THE RESULTS

With its new data and analytics platform in place, the firm better meets the investment needs of its clients and prospects and is equipped with more intelligent insights around companies, markets, and portfolios. The information available from FactSet's research desk and blog, FactSet Insight, has also been valuable for the bank, and FactSet has elevated the bank's level of confidence in discussing the market by becoming the bank's main data source for conversations with prospects.

Leveraging StreetAccount news along with FactSet's company and economic content, the firm now writes quarterly newsletters that intelligently provide insight into current market conditions and client's portfolio exposures and performance. Since their clients require sophisticated, sizeable data, the team heavily relies on FactSet's transparency and insights to bring value and trust in client relationships. With FactSet, the firm differentiates themselves from the competition with solutions that give them the advantage they need.

### DISCOVER SOLUTIONS

FactSet creates data and technology solutions for investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

#### Wealth Management Solutions

Exceed client investment goals with a solution that supports your wealth management needs.

[Get Started](#)

#### StreetAccount

Stay informed on current market intelligence news with FactSet StreetAccount.

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