

MoventumOffice








The platform for efficient and effective financial advisor processes

MoventumOffice is a web-based management and investment platform for financial professionals. With just a few clicks, you can open security portfolios for your clients, place orders for trades and gain access to analysis, reporting and support tools to help you with day-to-day client

management. Transactions are processed securely and transparently using highly automated processes. This digital securities trading platform gives you access to more than 10,000 funds, ETFs and other securities, and to asset management solutions.



Welcome to MoventumOffice

-  Visit the **Home** tab on the landing page for an overview of recent publications, current capital measures and new forms. You will also find the Moventum E-News content here, tutorials and user guides.
-  **Moventum Asset Management** receives detailed information about the investment strategies developed by Moventum. This includes asset management, funds of funds and additional investment models for different opportunity/risk profiles.
-  The core **Platform** section provides you with access to all the key functionalities of your securities trading platform: This is where you can find client and commission data, create analyses and reports, issue securities orders and open new accounts in just a few steps – and it can all be done completely digitally – if required.
-  The **MorningStar** tab gives you access to market information and fund and company reports, and you can also create comprehensive portfolio analyses here.
-  In **Asset Manager Inside**, selected asset managers provide you with exclusive access to their expertise. Take advantage of this additional offering and enhance your client meetings with innovative approaches and detailed background knowledge.
-  The **Postbox** tab is where you will find both your commission reports and the performance reports that you customized for your clients with the reports tool.
-  **Downloads** is where you will find all the forms, plus reference documents and information about consultancy support. All the marketing materials and other collateral is available for download here.

Your benefits at a glance:

-  A fund platform with over 10,000 funds, including ETFs and other securities
-  Detailed reporting and reliable support tools
-  Automated commission statements
-  Access to latest market news and MorningStar
-  Fully digital onboarding: Client and environment friendly
-  Clear, user-friendly design



Visit www.youtube.de/Moventumoffice to watch our MoventumOffice demo video.

Do you still need to set up access to MoventumOffice?
If so, please contact us at:
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