

PRESS RELEASE

Assette and Eagle Investment Systems establish strategic alliance to provide integrated marketing and client reporting for asset managers

December 13, 2017, Boston, MA – [Assette](#), a leader in cloud-based sales and client communications solutions for institutional asset managers, today announced a strategic alliance with Eagle Investment Systems LLC, a BNY Mellon company and leading provider of financial services technology, to provide an automated, integrated client reporting and marketing material capability to Eagle clients.

Today's institutional asset owners, consultants and manager database providers demand accurate, consistent portfolio and performance information—and greater transparency—from investment managers. In this environment, robust client reporting and sales communications platforms that support strong data governance protocols have become a necessity.

Eagle recognizes its clients' need for automating client reporting and sales communications as a part of a comprehensive information delivery strategy. Through this alliance, Assette will provide workflow and production capabilities that address this need. This collaborative solution helps to streamline the dataflow between Eagle and Assette, greatly improving the efficiency, accuracy and consistency of sales and client output.

"We are very pleased to work with Eagle to help mutual clients automate the production of sales and client materials," says Assette CEO Thusith Mahanama. "Automating this '[last mile](#)' at asset management firms is now a must-have, especially when catering to institutional clients."

"The need for reliable and efficient workflows to support accurate and timely client communication represents one more layer of value for investment management firms," said Joel Kornblum, Head of Strategic Alliances for Eagle. "By feeding the robust, clean and validated data from the Eagle platform into the Assette client reporting workflow, Eagle clients can experience further operational efficiencies and reduced costs."

[Learn more](#) about Assette's strategic alliance with Eagle.

ABOUT ASSETTE

Assette automates sales and client communications at institutional asset management firms. Asset managers use our software to integrate data from multiple sources and generate fact sheets, pitch books, database input, client presentations, client reports, and offer secure client portals. The result: consistent information across all external communications, produced in seconds and free of human error. Learn more at www.assette.com

ABOUT EAGLE

Eagle is committed to helping financial institutions worldwide grow assets efficiently with its award-winning portfolio management suite of enterprise data management, investment accounting and performance measurement solutions that are delivered over its secure private cloud, Eagle ACCESSSM. Eagle deploys trusted solutions and services that create operational efficiencies and help reduce complexity and risk. Eagle Investment Systems LLC is a subsidiary of BNY Mellon. Additional information is available at www.eagleinvsys.com or follow us on Twitter @eagleinvsys.

CONTACT

Andrea Morse, Director of Marketing, Assette andrea.morse@assette.com