



BROCHURE

PRIVATE CLIENT INVESTMENT
SOFTWARE

Fordsworth
Associates

ABOUT THE SYSTEM

Individual clients in the modern financial markets prefer to make independent decisions in their investments. This means choosing and making their own investment portfolio. They also want to make amendments to their individual investment portfolios.

We offer a cloud-based investment system that allows financial companies to manage individual investments, which includes shares trading, Unit Trust investments, ETFs trading, retirement annuities, offshore investments, and property.

Our digital solution caters digitalization of stock trading, ETF's, operational and regulatory processes.

WHY CHOOSE US

Fordsworth Associates commenced business in 2016 after three years of designing and working on a solution for its first client in South Africa. We are made up of professionals with a good blend of financial and software expertise. Founders have a combined experience of 30 years providing solutions to the financial services sector in Africa

Capitalizing on many years of experience in the financial services sector, Fordsworth delivers a range of innovative, internationally recognized investment management software with web and cloud capabilities. We deliver the tasks necessary to allow the client's project to run live.

BENEFITS

- Unique customers experiences with a customized approach
- Improved productivity and reduce operational cost
- Better-informed decisions by using the analysis tools provided
- Streamlined and improved communication with clients
- Control and monitoring risk at any time Proactiveness to market needs by delivering new products fast
- Compliance with international and local regulatory requirements

KEY FEATURES

- 360 degrees client management/portfolio & client reporting
- Portfolio valuations and automated pricing
- Maturities and cash allocations (transactions approval)
- Simulation and sensitivity analysis
- Integrated trading and settlements
- 24/7 access to portfolio through integrated web modules
- Real-time transaction processing and evaluations
- Client portal view with easy communication between clients and portfolio administrators
- Easy upload of KYC documents by clients
- Integrated payment gateway
- Corporate actions processing and reconciliation
- Easy processing of client's withdrawals

CONTACT US

Mont Tremblant Estate
959 Inchanda Road
Craivgon, Fourways, 2191

Email: hello@fordsworth.com

Website: www.fordsworth.com

PRIVATE CLIENTS INVESTMENT SYSTEM OVERVIEW

