



## Compliance



Introducing  
**PeerCompare™**

# Consider a Reasonable Range of Alternatives with Confidence

The Client Focused Reforms requires advisors to consider a reasonable range of alternatives available through the firm when making suitable recommendations.

PeerCompare™ is a simple-to-use app for finding and comparing reasonable product alternatives based on investment cost, risk and performance criteria.

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## See What's Under the Hood of Comparable Investment Vehicles

Dynamically create product peer-groups using industry-standard product categories and data. Identify product recommendations that are in the client's best interest by seeing how each recommendation compares to its peers among more than 275,000 product profiles.

View side-by-side comparisons of returns, risks, expenses and more. Just enter a Fund Name, CUSIP or Fund Code, and a peer group of available alternatives are sourced from your product shelf and presented based on configurable criteria that can include fund category, risk rating and time horizon. See at-a-glance how your recommendation compares against its peer group.

# Gain Intelligent Insight on How Recommended Funds Stack Up

Drill into each fund for insight on relative performance. Get context on costs, risk, and return that you can use to explain to investors why you would or would not recommend a fund.



## Track Disclosure and Meet Regulatory Oversight

Use PeerCompare™ to manage your recordkeeping, oversight, and disclosure requirements. Generate compliant recommendations for your clients effortlessly and intuitively.



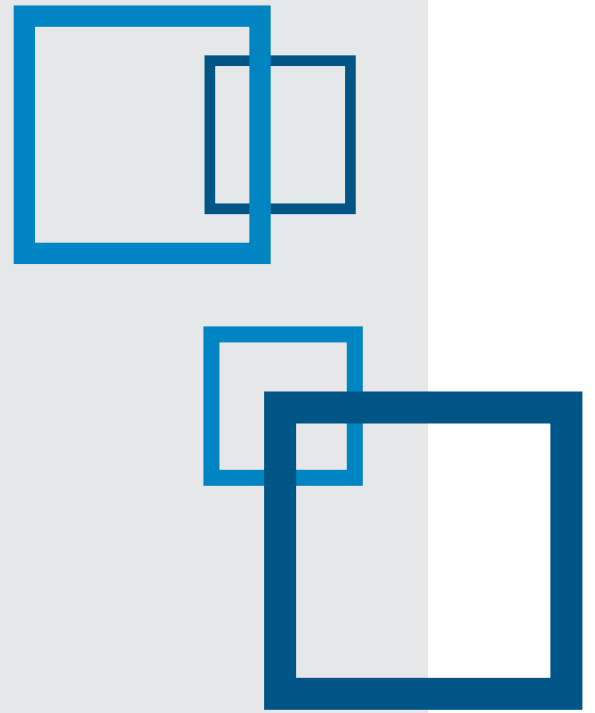
Get audit-ready



Meet the KYP & Suitability requirements of CFRs



Get up and running in 2 weeks



Get started with PeerCompare™ today!

Contact [info@InvestorCOM.com](mailto:info@InvestorCOM.com) for a demo.

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InvestorCOM is a leading provider of software and outsourcing services to the wealth management industry.

Our intuitive and innovative suite of RegTech solutions enable effective communications and disclosure in an increasingly regulated environment.

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