AGILITY WINS

cheetah

seize this moment.

A $68 TRILLION OPPORTUNITY

That's how much wealth will change hands in the United States in the next two decades as Baby Boomers pass down their assets and life savings to heirs.

The Great Wealth Transfer represents an unprecedented opportunity. But with every opportunity comes a risk—the risk that you'll be left behind.
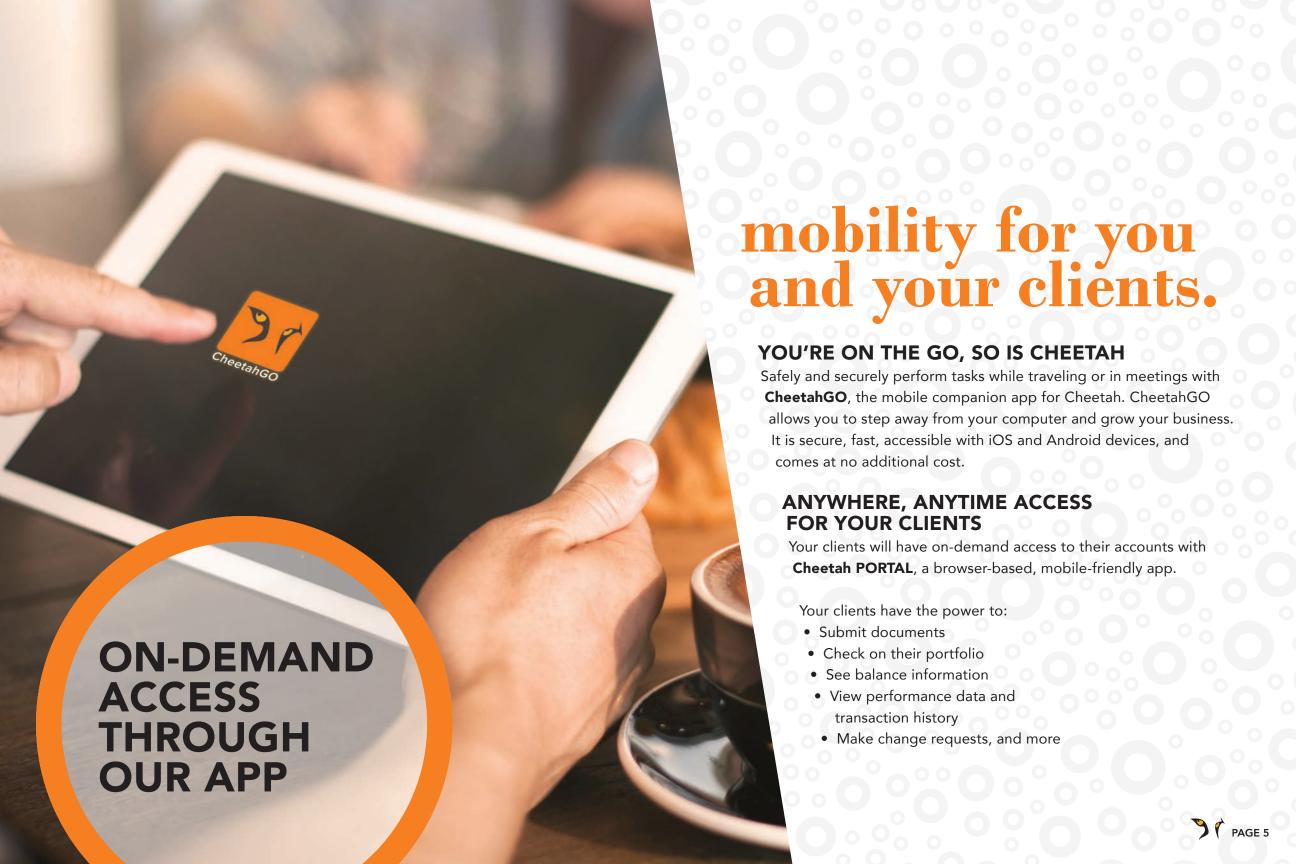
LEARN WHY CHEETAH IS THE ANSWER.

tech for growth.

THE MOST ADVANCED SOLUTION

Cheetah is the trust accounting and wealth management platform of choice for growth-minded institutions. That's because you'll spend less time in front of the computer and more time building your business.

- Increase your efficiency with an intuitive design and streamlined workflows
- Work from anywhere, on your laptop or mobile device
- Reduce IT costs with cloud technology
- Track key performance indicators in real time
- Offer your clients on-demand account access
- Uncover hidden opportunities with analytics and business intelligence
- Manage investments and more— all in the same location

$68 TRILLION OPPORTUNITY

mobility for you and your clients.

YOU'RE ON THE GO, SO IS CHEETAH

Safely and securely perform tasks while traveling or in meetings with **CheetahGO**, the mobile companion app for Cheetah. CheetahGO allows you to step away from your computer and grow your business. It is secure, fast, accessible with iOS and Android devices, and comes at no additional cost.

ANYWHERE, ANYTIME ACCESS FOR YOUR CLIENTS

Your clients will have on-demand access to their accounts with **Cheetah PORTAL**, a browser-based, mobile-friendly app.

Your clients have the power to:
- Submit documents
- Check on their portfolio
- See balance information
- View performance data and transaction history
- Make change requests, and more

ON-DEMAND ACCESS THROUGH OUR APP

CheetahGO

GET SMART

Cheetah INSIGHTS

Data-driven decision making is critical to growth. Gain a better understanding of the real-time trends that accelerate your business through the analytics in **Cheetah INSIGHTS**.

- Explore the cause-and-effect relationships of revenue and and asset under management
- Make business predictions and financial estimations
- Detect market fluctuations that impact revenue

BE EFFICIENT

Cheetah FLOW

Streamline and automate client onboarding by introducing digital account opening from **Cheetah FLOW**.

- Create an exceptional client experience
- Eliminate manual data entry
- Scale for growth

EXPECT MORE

Cheetah EXCHANGE

Get timely and accurate asset pricing and market analytics directly to Cheetah with **Cheetah EXCHANGE**.

- Consolidated data reduces licensing needs
- Integrated Moody's ratings available
- Nightly pricing updates
- GICS & performance info at your fingertips
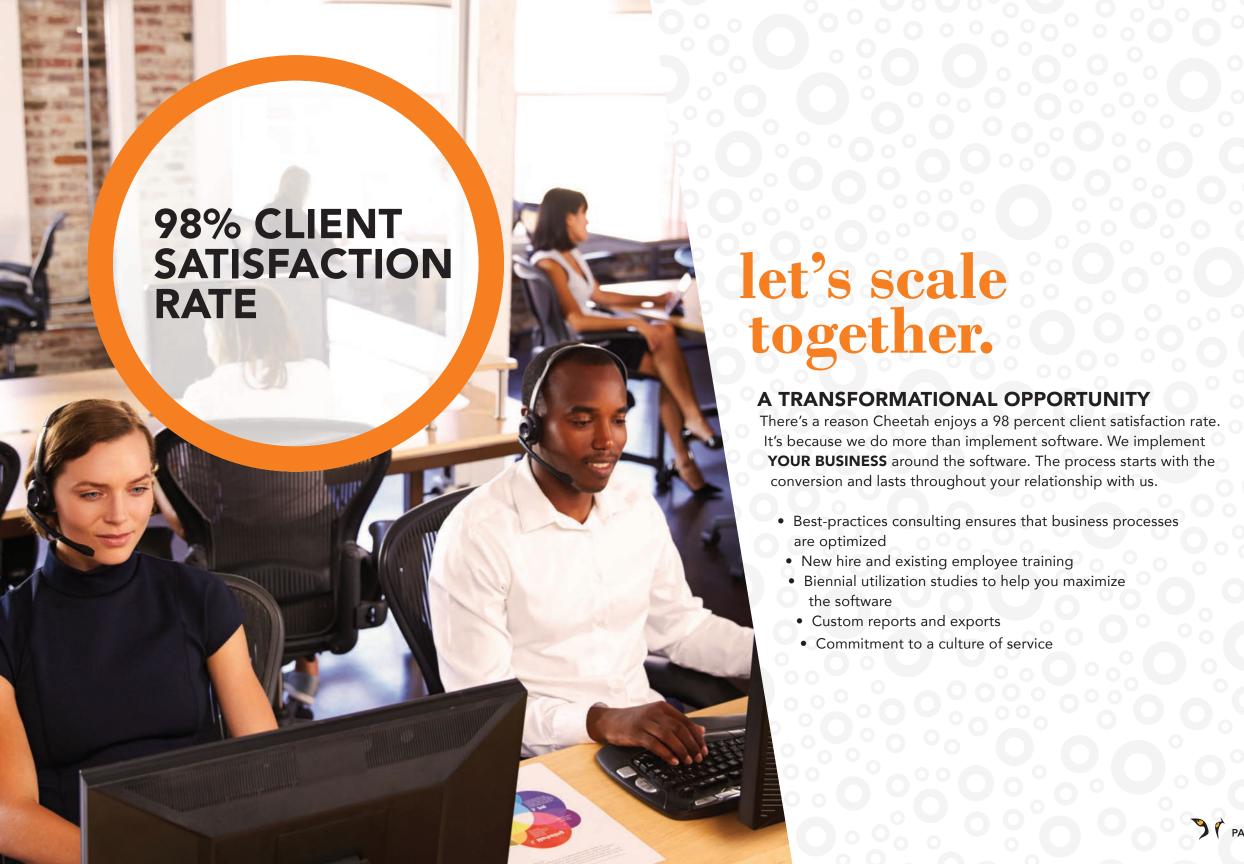- Historical distribution record

CREATE & INTEGRATE

Cheetah CONNECT

Cheetah CONNECT transforms data sharing between Cheetah and any third-party system via a powerful and extensive application programming interface (API) library.

- Create powerful cross-platform workflows
- Eliminate silos and monetize data
- Create new products and services

98% CLIENT SATISFACTION RATE

let's scale together.

A TRANSFORMATIONAL OPPORTUNITY

There's a reason Cheetah enjoys a 98 percent client satisfaction rate. It's because we do more than implement software. We implement **YOUR BUSINESS** around the software. The process starts with the conversion and lasts throughout your relationship with us.

- Best-practices consulting ensures that business processes are optimized
- New hire and existing employee training
- Biennial utilization studies to help you maximize the software
- Custom reports and exports
- Commitment to a culture of service

efficiency. profitability. growth.

"With Cheetah, we don't have to sink a bunch of costs into hardware and dedicated servers that immediately depreciate. We can instead invest that money into retaining and attracting the right personnel, which is what has allowed us to become profitable in just two years."
Brian Simmons
Co-Founder and Chief Trust Officer
IconTrust, LLC

"When we were converting to Cheetah, we were also at a point where we were considering whether we needed another operations person. But Cheetah was so efficient, we ended up not needing to hire for that position. It saves a lot of time because there is so much automation in the system."
Amy Barber
Trust Advisor
Central National Bank

cheetah

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