

Robust Portfolio Monitoring and Reporting



AssetBook

Your Next Chapter in Portfolio Management

Pulse by AssetBook is an attractive, easy to use, and intuitive portfolio management system built with an open API. Simple to integrate with your other software, Pulse makes it easy to interact with all of your firm's integrations in a meaningful way.

Pulse makes it simple to easily and intuitively monitor your top investments.



698%

Average Client Growth
(5 Year Period)

9.5/10

Satisfaction Rate



Client Servicing and Reporting

Transfer files, upload documents, and deliver portfolio performance and tax consideration information to clients within seconds through our easy to use client portal.



Asset Allocation Monitoring

For many advisors, it's critical that allocations are managed carefully. Our allocation monitoring feature gets the job done with up to four levels of classification & reporting.



Tax Management and Planning

Get a comprehensive understanding of your clients' portfolio tax picture so you can manage their unrealized and realized gains and losses, right down to the individual lots.

Save time, deliver precise reporting, and provide real value.

Go to www.AssetBook.com to learn more and request a demo.