

Wealth Management QHub

A Turnkey Solution for All Reporting and Publishing Needs

What is QuestionnaireHub?

QuestionnaireHub, or QHub for short, is a data warehouse combined with a content management and publishing software that helps you overcome challenges in gathering necessary data and information from investment managers. QHub streamlines data entry and document creation for sponsor firms.

QHub is user friendly with a small learning curve that helps you get up and running almost immediately. QHub can be used for any required document or web-based form, as well as for any program type SMA, Mutual Fund WRAP, UMA, RIA or regular reporting. The platform can be fully customized to provide data feeds.

Why was QHub Built?

Every quarter, investment managers are required to document a wide range of information about their strategy and performance for program sponsors. This information is then returned to program sponsors in the form of completed questionnaires for each manager's investment products. This requires a considerable amount of effort – e.g., a manager with four styles in two programs receives eight separate questionnaires requiring responses to hundreds of questions per quarter!

Data must be tediously and repetitively gathered, organized, and entered into non-standardized

A blue square containing the white text 'QHub' is positioned to the left of a vertical list of five items. Each item is preceded by a green chevron symbol. The items are: RFP Response, RFI Response, Due Diligence Report, Marketing Material, and Website Entry.

- > RFP Response
- > RFI Response
- > Due Diligence Report
- > Marketing Material
- > Website Entry

questionnaires. Adding to the challenge, the format of final documents and deadlines vary from case to case.

Typical problems include:

- > The growing number of RFIs, DDQs, and Client Reports
- > Huge amounts of data
- > Manual processes that are increasingly costly to scale, both for data management & publishing

Such companies need:

- > A solution to automate the monthly and quarterly data aggregation process
- > A solution to automate periodic publishing in place of hiring more internal resources, a single, scalable solution

QHub is the final solution for these common challenges:

Complex reporting/publishing requirements

Delivering large amounts of quarterly data and qualitative information through multiple methods, in various formats, within a short time frame

Relying on manual processes that are time-consuming and labor-intensive

Pulling resources from multiple departments in order to complete questionnaires, format them correctly, and deliver on time

Keeping data secure and managing access control

QHub Delivers Value

REDUCE RISK

MORE TIME FOR CAMPAIGNS

REPORT ON-TIME

SAVE TIME

AUTOMATE PUBLISHING

REDUCE ERRORS

ORGANIZE DATA

MORE TIME FOR STRATEGY

REPORT ACCURATELY

QHub Provides

Easy data entry with copy forward and smart paste functions

Document auto-fill maps basis past responses for faster review

Third party data feed and external data source integration available

24/7 expert service bureau facilitates timely reporting and support

Flexible deployment offering onsite or hosted solutions

Browser plugin available for automating website populating and reporting

Key Benefits

- > Keep data secure and centralized
- > Full information ownership, we can host or you can host
- > Manage workflow with built-in tools and usage levels
- > Zero IT footprint with hosted solution
- > Streamline your reports