

# Pitchbook

An easy way to make sure your financial advisors correctly propose a product to your HNI customers and investors.

Choosing or creating the right structured product or investment strategy for your 'wealth' customers can be tricky. Not only do you have to worry about the risk appetite of your customer, but also the compliance.

Pitchbook is an easy to use, drag and drop way to create your pitch to your customers. It keeps content up to date and compliant. It also segregates content by jurisdiction, and ensures your financial advisor pitch is consistent.

With **Pitchbook**, we automate the process through:

- \ Dynamic generation of pitch
- \ Approval flows for content slides before they are open for consumption
- \ Configurable cross border business rules

- \ Responsive design for content parity across devices
- \ Analytics around content usage, pitch creation, and user audits
- \ Quick search with content tags
- \ Bulk upload for 100s of content
- \ Auto Refresh expired or old slides
- \ Easy to use off the shelf presentations
- \ Shopping cart user experience to build pitch
- \ Manage Content Library including dynamic content templates
- \ Create and manage campaigns
- \ Ensure compliance management for content expiration
- \ Generate Pitchbook by drag and drop contents
- \ Preview content before adding it to the pitch

## About Persistent

Persistent Systems (BSE & NSE: PERSISTENT) builds software that drives our customers' business; enterprises and software product companies with software at the core of their digital transformation. [www.persistent.com](http://www.persistent.com)

## About OutSystems

OutSystems is the number one low-code platform for rapid application development. Thousands of customers worldwide trust OutSystems as the only solution that combines the power of low-code development with advanced mobile capabilities, enabling visual development of entire application portfolios that easily integrate with existing systems.