

## Online Financial Portfolio Management

### Client Brief

Our Client is a SaaS based financial software company headquartered in Phoenix, Arizona. Its flagship product is a patented application that determines the adjusted cost basis for securities.

### Business Challenge

The client's existing application had a limitation to support single security class i.e. Stocks/Mutual Funds and did not store user data. The client required a web based integrated portfolio management solution that could cover more security classes and support their daily operations with improved functionality. They also wanted to provide their users with more user friendly UI, improved analytic and reporting functionality.

### Our Solution



## Business Benefit

The product provided following benefits to its users:

- Single interface via which user can diversify his portfolio in different segments and take decisions on distribution based on the risk assessment and What-if scenario tools
- Flexibility to adjust Cost Basis by making choices in tax method at a transaction level using Tax Optimization Tool
- On-demand Tax Return form generation keep user posted on their tax liabilities
- Detailed information on all corporate actions initiated on user's holdings during their possession in their account

## Technology Spread



## Achievements:

ePortfolio Manager received two American Business Awards [The Stevies] at 10th Annual Stevie Awards:

- **1st Bronze:** Best New Product or Service of the Year in the Software, Asset Management Solution category
- **2nd Bronze:** Best New Product or Service of the Year in the Software, Financial Management Solution Category

## About InterraIT

InterraIT is global IT consulting & services company providing business software solutions that improve operational efficiencies, address organization's unique business needs, and allow better ways to access and manage information at lower TCO & achieve faster ROI. Established in 1996 & headquartered in San Jose, InterraIT's has world-class delivery centers in India & has client-partner network spanning across the United States. InterraIT is SEI-CMM level 5 accredited & ISO 9001-2008 certified organization.

## Corporate Office

25 Metro Dr., Ste 550, San Jose, CA 95110  
Tel +1 408 451 1700, Fax +1 408 441 7495  
Sales@InterraIT.com  
www.InterraIT.com