

# 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

We are a trusted Digital Engineering and Enterprise Modernization partner, combining deep technical expertise and industry experience to help our clients anticipate what's next. Our offerings and proven solutions create a unique competitive advantage for our clients by giving them the power to see beyond and rise above. We work with many industry-leading organizations world-wide including 14 of the 30 most innovative US companies, 80% of the largest banks in the US and India, and numerous innovators across the healthcare ecosystem. Our company fosters a values-driven and people-centric work environment. Our strength of over 22,500+ employees is spread over 18 different countries across the globe.

### USA

Persistent Systems, Inc.  
2055 Laurelwood Road, Suite 210  
Santa Clara, CA 95054  
Tel: +1 (408) 216 7010  
Fax: +1 (408) 451 9177  
Email: [info@persistent.com](mailto:info@persistent.com)

### India

Persistent Systems Limited  
Bhageerath, 402  
Senapati Bapat Road  
Pune 411016  
Tel: +91 (20) 6703 0000  
Fax: +91 (20) 6703 0008