Charles River’s end-to-end enterprise solution delivers institutional-class capabilities to support the diverse needs of the wealth market.
Anytime, Anywhere Access

Charles River offers flexible delivery options to accommodate different wealth manager needs, including desktop, web browsers and mobile access. All functions use the same processes behind the scenes regardless of access method, allowing consistent results.

Charles River Anywhere supports browser-based construction and management of Multi-Strategy Portfolios (MSP), Unified Managed Accounts (UMA) and Unified Managed Household (UMH) portfolios. The wealth platform’s flexibility enables firms to manage their portfolios by a central desk, by advisors or in a hybrid manner.

The web-based architecture makes it easy to deploy Charles River’s wealth platform for thousands of users, enabling wealth managers, financial advisors and other investment professionals to securely monitor and manage real-time portfolio, trade, compliance and post-trade information. A fully configurable dashboard allows financial advisors to quickly personalize information to manage complex accounts and client relationships.

Charles River Mobile meets the wealth market’s demand for mobility by giving managers a “big picture” view of their portfolios via iOS and Android devices. The intuitive dashboard allows portfolio managers to monitor asset allocations, track portfolio exposures, and view top holdings based on the latest trade information. Wealth managers can drill down into accounts to monitor clients’ investments and positions, track open orders and trades, and respond to compliance alerts. Financial advisors can make in-person client meetings more interactive by using tablets as graphical reporting and presentation tools.

Key Capabilities

- Rebalance high volumes of SMA, UMA and UMH accounts
- Construct characteristic-based allocation models and custom benchmark portfolios
- Ensure tax-efficient and tax-optimized portfolios across households
- Handle portfolio, compliance, trade and post-trade activities via web browsers
- Customize portfolios, household-, and multi-generation-oriented views
- Centralize maintenance of all underlying performance data in a single system
- Monitor firm compliance and risk

About Charles River

Charles River provides an enterprise solution to automate the investment management process across asset classes and streamline front and middle office operations for buy-side firms. A single solution integrates software, hosting, application management, data, and FIX connectivity to support portfolio management, performance and risk, compliance monitoring, order and execution management and post trade processing. The company has more than 350 clients in 43 countries in the institutional asset and fund management, alternative investments, wealth management, insurance, banking, hedge funds and pension markets.

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Charles River Development reserves the right to change plans, priorities and future enhancements at any time without notice. (Updated May 2014)