OneView: The All-in-One Advisory Platform

No matter where you are in the world, financial advising is rapidly becoming more complex. As investor demands become more diverse and sophisticated, the need to provide differentiated client service is growing – and that means high-performance technology, real-time information and operational efficiency are absolute must-haves.

Built for investment managers, independent brokers, family offices and anyone else managing multiple accounts, OneView delivers everything you need to confidently trade equities and options, take consolidated views, drill into individual accounts, and keep your clients happy in the process.

The result? Increased productivity and reduced costs.

Core Features

- One streamlined portal enabling users to easily view and access accounts, with vast customization options
- Robust trading capabilities, risk management, compliance monitoring, modeling, market insight tools and CRM tools – all in real time and through an elevated user interface
- A custodian-agnostic offering – no need for your clients to move their accounts for you to serve them
- Efficiently serve client bases of virtually any size, from a few accounts with large balances to thousands of accounts with smaller balances
- Streamlined day-to-day activities and workflow, creating more time to differentiate offerings and add new clients
- A flexible and responsive UI – freely move tabs across windows, extend to multiple monitors, select themes, curate views and access from anywhere

Inside OneView

Dashboard

Take a bird's-eye look at your business

- Customize your layout to view any combination of real-time metrics encompassing all accounts, including money movement, account types, account sizes, top positions, sector distribution, market cap distribution and more
- Keep up to date with relevant headlines and access performance statistics across various indices and sectors via consolidated news and data feeds embedded in the platform
- Stay on top of options expiration and easily view which options on-hand are in the money

Accounts

Always know where your clients stand

- View dashboards for individual accounts to access information on balances, positions, activity, individual trades and more
- Serve clients more effectively by identifying which accounts have the most cash available – then put it to work
- Group accounts based on household, strategy or other criteria and view consolidated positions and metrics to prevent overallocation

Investment/Position Research

Dive into specific stocks and options

- Use powerful search capabilities to instantly view market moves and positions for individual securities
- View company fundamentals and access advanced charting tools
- Look up full transaction history and pre-populate trade tickets

Models

Build, visualize and optimize in real time

- Create custom model portfolios, link relevant accounts and instantly view if any positions or allocations are missing
- Model based on a wide range of criteria, including specific accounts, positions, activities and more
- Benefit from direct integration with ViewTrade's Watchmen engine for real-time risk management, buying power verification and more

Trading

Deliver efficient, error-free execution that serves all clients

- Trade a full menu of equities and options on behalf of single accounts or withing an average-price account
- Easily execute block trades, with pre-allocation features to distribute or reduce precise percentages of specific securities across selected accounts
- Save orders for easy performance tracking or future use

Transfers

Ensure clients are fully prepared to face the markets

- Track money transfer transactions from a global perspective, including consolidated inflows and outflows, and assess trends
- Monitor authorization and verification of bank and ACH links

Clients

Provide differentiated client service

- Scale your business through an array of toolsthat make it easier to quickly add new clients and support any custodian with full compliance
- Leverage CRM capabilities that enable differentiated client service, with ability to view key metrics and add notes with crucial information per account
- Give clients access to an individualized client portal (as view-only or with trading functionality) where they can monitor their accounts, drill down across positions and download confirmation statements and tax information

Insights

Keep your finger on the pulse of the markets

- Stay informed on key firms, sectors and market happenings through integration with ViewTrade's Content and Analytics Suite
- View essential metrics on activity and performance and customize your experience through third-party data feeds on areas like top analyst picks
- Access a range of dedicated tracking and lookup capabilities on options, ETFs, IPOs, earnings calendars and more

Reports

Demonstrate performance and compliance

- Create a wide variety of reports for areas including AUM by account or asset, account activity and more
- Easily export reports to Excel for easy integration with operational or compliance workflows
- View full histories for individual accounts, securities and sectors to track performance, streamline client reporting and bolster business development

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Contact Us

Email sales@viewtrade.com or scan the QR code to begin streamlining and expanding your retail brokerage capabilities with OneView, the All-in-One Advisory Platform