Understanding your wealth, risk and performance

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NAVIGATING THE WORLD OF INVESTMENTS

Assure Wealth makes it easy to manage wealth

We are not asset managers. We provide data and reports and offer Wealth monitoring across your portfolios. This makes it easy for you to understand your total wealth, risks and returns so you can make the decisions that are right for you.

We are your independent Reporting adviser and business partner 100 per cent.

Assure Wealth retrieves data automatically from 30+ custodians in Denmark and abroad – giving you a complete overview and facilitating your decision-making and actions.

Assure Wealth provides our clients with:

- Simple and understandable overviews of total wealth, risks and returns
- Reports which may include unlisted shares, private equity and alternative investments
- A comprehensive solution for securities management
- Ongoing follow-ups on your management setup
- A business relationship built on trust and confidence in which Assure Wealth acts in your best interest

That's a true asset, our clients say.

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Automatic securities reporting, securities management outsourcing and controlling for Family Offices

Many Family Offices benefit from Assure Wealth's solutions. Our setup makes it simple to collect data for ongoing management reporting and risk management of the entire portfolio managed by each Family Office.

Being a Family Office and a client with Assure Wealth, you can autogenerate professional reports at all levels of the portfolio whenever you need them. We also provide Family Offices with reports looking through portfolios.

Assure Wealth's reports are thus an effective management and management tool, so that the executive board and the board of directors have an overview of the overall portfolio and its impact on the relevant ratios at all times .

As an example, the Assure Wealth ESG Reporting provides a simple overview of how portfolios currently align with the sustainable investment targets.

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Wealth reporting – Tailored reports

Reports constitute the core of Assure Wealth's services, giving you an overview of the entire wealth portfolio covering accounts, deposits and other assets.

Assure Wealth has developed a unique reporting tool that monitors and handles the reporting of our clients' securities holdings and provides consolidated reports covering and combining data from asset managers and banks. This overview and ongoing reporting provide a solid basis for an independent assessment of your investment performance.

Even if you switch assets managers or add new ones, your reporting structure and reporting format remains unchanged.