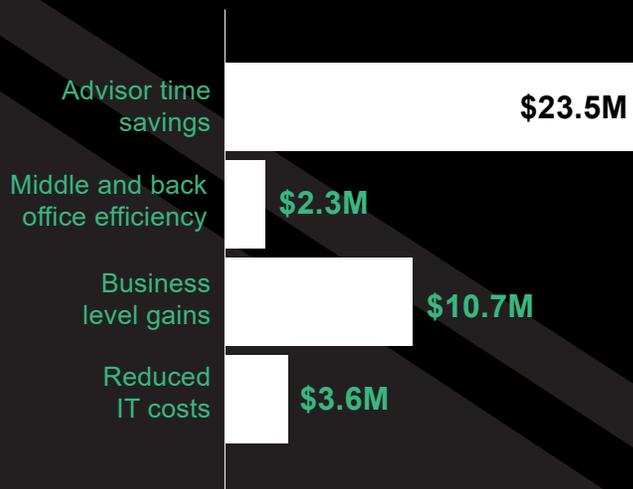


The Total Economic Impact™ Of VestmarkONE®

Through four customer interviews and data aggregation, Forrester concluded that VestmarkONE has the following three-year financial impact.

SUMMARY OF BENEFITS

Three-year risk-adjusted



“

It is a much more efficient way to rebalance and to run model portfolios. You want to run a model across many accounts and rebalance efficiently – compared to what we had prior it’s been a huge win. Advisors have said to us specifically that this tool has saved them a lot of time over our old architecture.

*VP of equity advisory,
Financial services*

”

VestmarkONE® BY THE NUMBERS

- Advisor time savings of **15%**
- Increases AUM growth by up to **10%**
- Reduces the effort of middle-office workers by **33%**
- Decreases back-office work effort by **75%**

FINANCIAL SUMMARY



ROI
66%



NPV
\$15.99M



PAYBACK
<12 months

VOICE OF THE CUSTOMER

“Having to reconcile over a million accounts every single day – it simply wasn’t very doable on our old model. We’ve decreased the work down to 20% of what it was before.”



Manager of advisory operations, Financial services



Read the full study

This document is an abridged version of a case study commissioned by Vestmark titled: The Total Economic Impact Of VestmarkONE, March 2022.

Commissioned By



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