



Moody's Analytics Wealth Scenario Generator is a modeling engine that provides support for your financial planning and investment decision making. It provides the modeling framework required to illustrate the likely range of financial outcomes for any investment strategy and cash-flow profile. This allows for the comparison of risk and return of different options.

### Compare Financial Planning Options and Alternative Investment Strategies

- » Helps assess investment suitability, illustrate potential loss, and align investment solutions with a client's risk profile and financial objectives.
- » Efficiently monitor a portfolio against client needs, using automated tracker alerts to enable a value-added advice services.
- » Access an objective basis to validate portfolio rebalancing and consolidation decisions.

- » Embed an “attitude to risk” questionnaire to evaluate accumulation or decumulation strategies.
- » Integrate a web-based calculation engine into robo-advice planning software.

### **Configure Modeling Functionality for the Adviser or Product Manufacturer**

- » Model a wide range of sophisticated product features, including asset allocation glide-paths, constant-proportion portfolio insurance, guarantees, and investment-linked and variable annuities.
- » Model a range of assets, including real estate, alternatives, hedge, commodities, infrastructure, and emerging market debt, consistently across multiple markets.
- » Update economic assumptions quarterly, consistent with current market prices and conditions.
- » Receive comprehensive documentation of all models and quarterly economic assumptions.
- » Gain a multi-currency, multi-economy model that supports advice and planning solutions in any market or currency.
- » Receive support from Moody's Analytics global financial economic research group.

### **Integration and Deployment**

The Wealth Scenario Generator has a fully documented application program interface (API), designed to support easy integration with existing client services, platforms, and tool sets. Our Implementation Services team helps clients design and integrate their own planning solutions. Moody's Analytics supplies the Wealth Scenario Generator calculation engine and API, configured according to our client requirements. Clients may then create the end-user interface according to their own brand and user experience requirements.



## CONTACT US

Find out more information about Moody's Analytics award winning products and solutions.

[www.moodyanalytics.com/contact-us](http://www.moodyanalytics.com/contact-us)

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