

# **ROCKIT® SOLUTIONS**

*Preserving Wealth through Innovation*

## Our Solution Suite™ includes:

Data Aggregation | Reconciliation & Data Enrichment | Portfolio Accounting  
Investment & Performance Reporting | Partnership Accounting  
Tax Services | Principal & Income/Trust Accounting



**Data Confidence.** Rockit collects client data from multiple sources and providers. While some services import data from just one source, Rockit captures data from the initiators.



**Investment & Performance Reporting,** is the most tangible deliverable advisors can give to their clients. Quality and convenience mean everything. Rockit has enhanced reporting that offers quality and accurate reports in a timely manner.



**Portfolio View™** a web-based tool that offers easy, intuitive and online access for wealth holders to view their financial data securely.



**Rockit® Command** is the powerful technology platform that can be accessed by financial professionals to view their clients financial data. The integrated general ledger provides a deeper level of granularity for the investment decision makers and other trusted advisors.



**Partnership Accounting and Tax Services,** includes the allocation of income, expenses and unrealized gains and losses, as well as automatically calculating capital percentages.

Learn More About Our  
Enhanced Platform at  
[www.rockitco.com](http://www.rockitco.com)

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