



Fostering Growth. Empowering Investors.

Our reporting solutions help financial firms create absolute transparency while empowering investors to simplify and better understand their financial world.

First Rate CORE

CORE is a holistic web-based console designed to meet the complex, evolving performance measurement and client reporting needs of today's financial services marketplace.

ARKON Rule your world

ARKON is a comprehensive and robust client reporting and CRM solution enabling wealth managers to master their workflow and optimize client relationships.

First Rate *Lightning*SM Powerful Reporting in a Flash

First Rate Lightning provides financial institutions with a turnkey solution to deliver easy to use and sophisticated firm-branded client reports in a flexible and scalable structure.

1R UNIVERSITY

BUILDING YOUR CAPACITY TO INNOVATE

First Rate University is a collaborative and go-to-source for investment and performance education specific to the wealth management space.

We Are More
Than Performance.



To learn more, visit:
www.firstrate.com