



PERSISTENT

PitchBook



PERSISTENT

STREAMLINING THE LAST MILE

Persistent Systems' PitchBook is a dynamic pitch creation tool for Investment & Wealth Management Firms. It enables Client Advisors to create a pitch on the go with the latest product information while ensuring compliance. PitchBook offers a robust platform for Product, Marketing, Investment, and Compliance Teams to extend their recommendations and analysis to the front office. This tool reduces your carbon footprint allowing you to make presentations directly from your device, eliminating paper.

Quick. Easy. Hassle-free.

PitchBook IS PERFECT

Manage Slides:

Creates, edits, and archives your slides library with a focus on compliance.

Insightful Dashboard:

Provides easy to access dashboard with most important content with in-depth analytics on multiple parameters like products, regions, and advisors.

Consistent Branding:

Offers a way of delivering consistent templates for all the presentations across the regions enabling one organisation, one brand.

Manage Glossaries and Disclaimers:

Generates glossary and disclaimers for the pitch dynamically, and generates alerts for missing terms without leaving the system.



Ready for Audit:

Provides audit information at the fingertips when you need it, where you need it. Every transaction in the system leaves a trail.

Future Ready:

Allows easy integration with CRM platforms and external third party apps, pluggable Machine Learning & Artificial Intelligence Engine.



PERSISTENT

Persistent Systems Inc.,
26 – 28 Hammersmith Grove,
London W6 7BA, UK.

www.persistent.com

+44 20 3008 7203