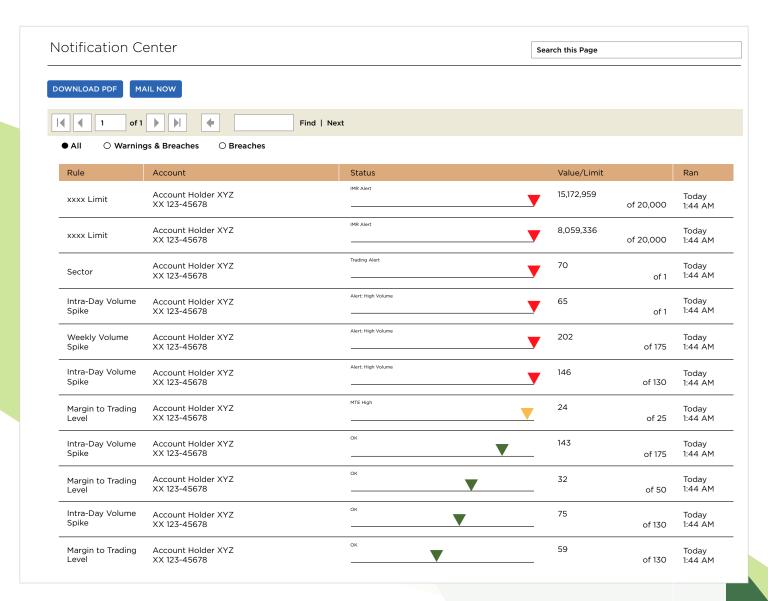


# HARVEST NOTIFICATION

Rules based engine turning data into actionable information



Most reporting systems produce large amounts of data, but to monitor position, margin and other relevant data can be difficult and time-consuming.

Notification serves as a hub to monitor positions, margin and other relevant data. The exception-based engine issues alerts when user-specified rules exceed incremental threshold levels.

# **Features**

## **Exception-Based Notification**

- Monitor account against user-defined rules
- Limit information relevant to specific needs
- Track investment guidelines

- Apply rules to a single or a portfolio of accounts
- Send alerts to users for acknowledgment
- Delegate monitoring to other team members

## **Customizable Rules**

- Sizable and growing library of preset rules
- Trackable dimensions include P&L, margin, activity, sector traded, volume, and others
- Select and define single or multiple thresholds
- Set one-time or recurring notifications

# **Flexible Monitoring Options**

- Event-based email alerts and reports
- Online interactive monitoring dashboard
- Login redirect for unacknowledged breaches
- End-of-day summary report

## **Safety & Security**

- Two-factor authentication available
- Disaster recovery best practices
- Third party penetration testing

- Data at rest security transparency
- User-defined security policies
- Local administration of user access

# HARVEST PRODUCT SUITE

### Reporting

Transparency for all your brokerage accounts in one place

## Matching

Reconcile any data quickly and flexibly with minimal onboarding time

## **Allocation**

Create allocation instructions interactively or automatically with full transparency

### **Notification**

Turning data into actionable information

#### Risk

Delivering sophisticated portfolio risk analysis

#### For More Information

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