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# Reporting at the Speed of Advice

## Modern, flexible reporting—built for how advisors work today

Envestnet Tamarac's Report Studio streamlines the reporting process by helping advisors create personalized, client-ready reports faster and more efficiently. Combining a modern design experience, unified data access, and AI-powered capabilities, it enables firms to improve consistency, strengthen brand control, and move from data to polished reports in minutes, all while maintaining complete oversight of the final output.

## Key Features

**Drag-and-Drop Interface**
Build reports with eae by arranging tables, charts, and content exactly where you want them.

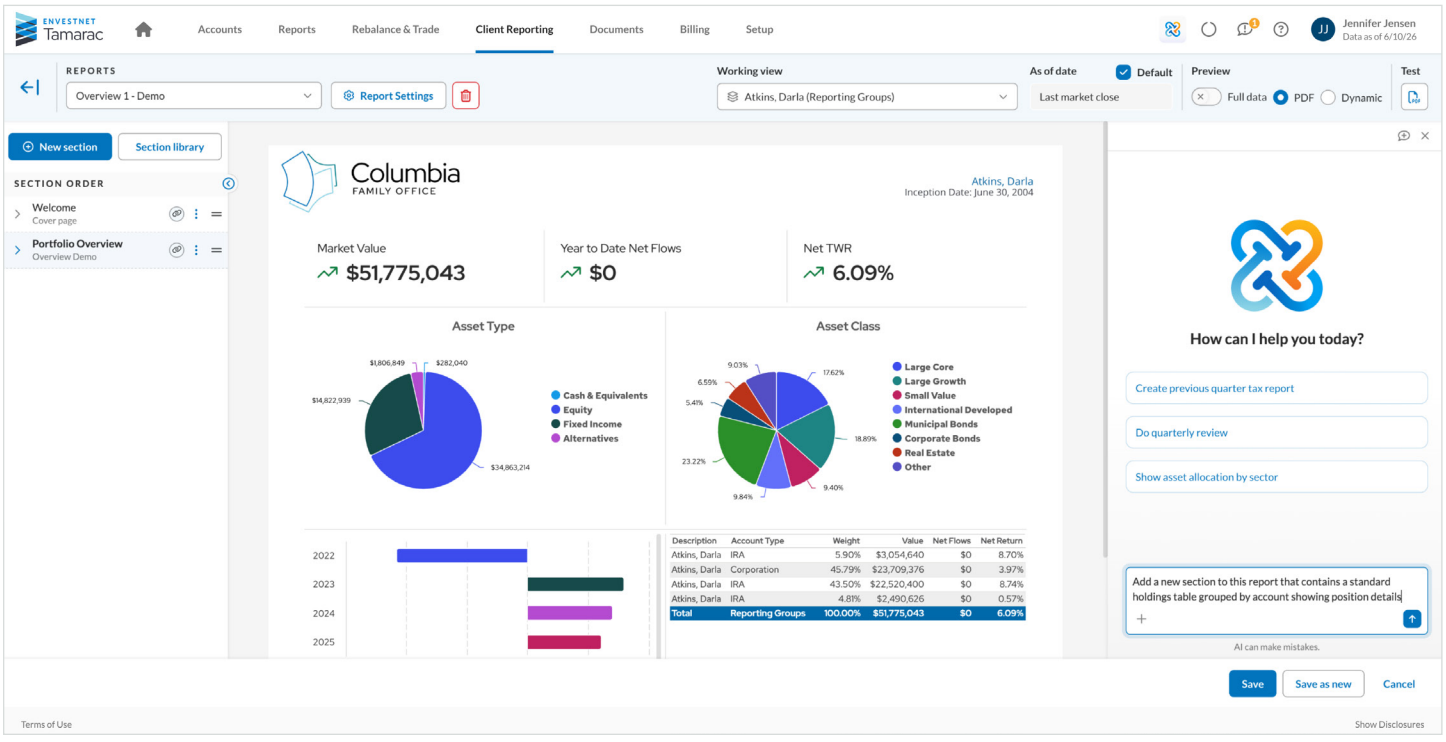
**Modularized Report Construction**
Create reusable sections and modules to streamline report creation and maintain consistency.

**Live Data Preview**
See client data populate in real time as you build and customize reports.

**Brand Focused Customization**
Apply firm branding with customizable themes, font, colors, and chart styling.

**Unified Data Integration**
Combine performance and holdings data in a single view for more comprehensive reporting.

**AI-Powered Efficiency**
Accelerate report migration, report editing, and data analysis with built-in AI assistance.



Reporting doesn't have to consume valuable advisor time. Tasks that once took 30 to 60 minutes can be completed in as little as five minutes with Report Studio, freeing advisors to focus on clients while retaining oversight of every final decision.

With Report Studio, advisors can:

- Accelerate report creation from up to an hour to just minutes.
- Standardize report quality across the firm.
- Produce personalized client briefs using integrated AI capabilities.
- Share reports securely through the client portal.

## AI-Powered Reporting, Built for Advisors

Tamarac Report Studio combines AI-powered automation with advisor oversight to accelerate report creation and analysis.

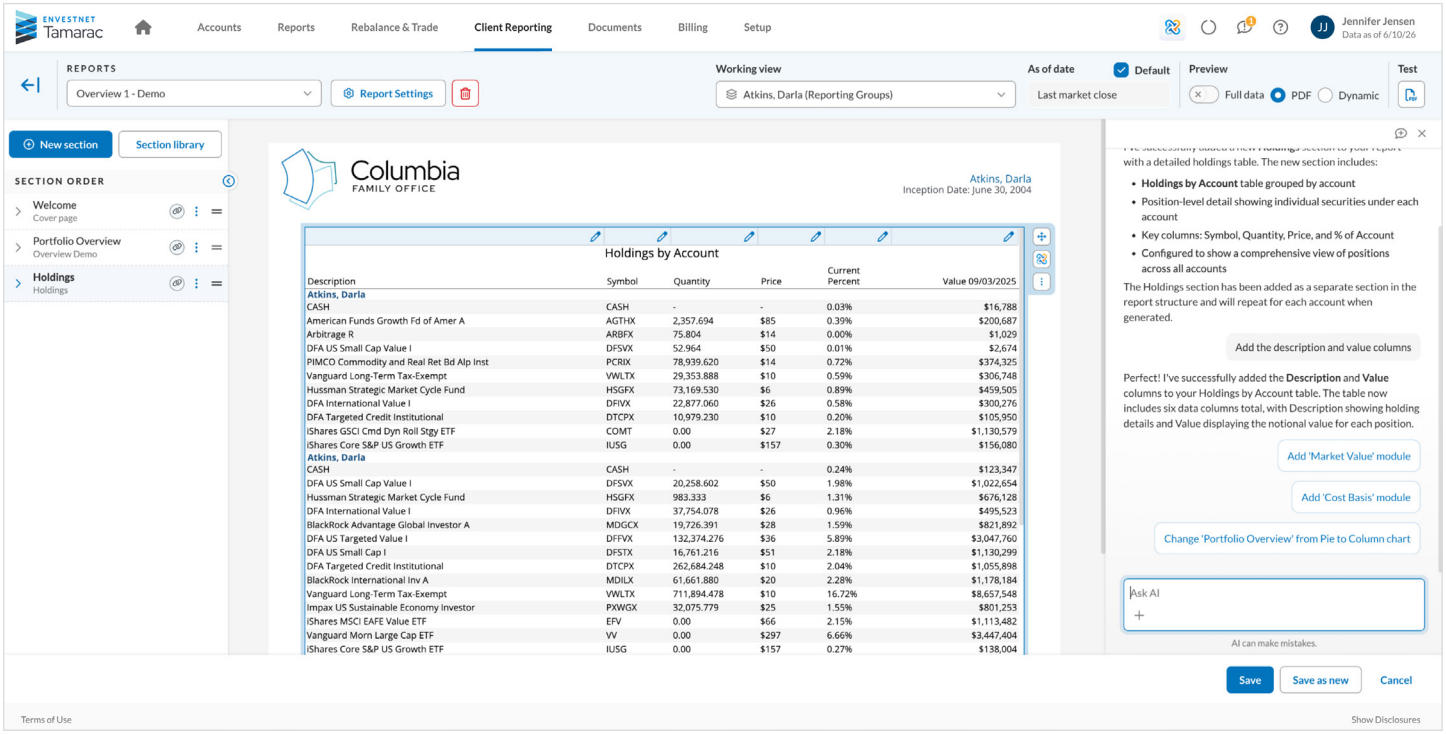
**AI-Assisted Report Migration**
Converts legacy Tamarac reports into modern, editable Report Studio templates while preserving branding, layouts, and key data elements.

**AI-Powered Editing**
Allows advisors to create and modify report components using prompts directly within Report Studio.

**AI Data Analyst**
Enables advisors to use natural language queries to explore client and account data, generate client briefs, analyze activity across date ranges, and surface actionable insights.

**Built-In Governance**
Provides immutable audit logs and guardrails that help ensure secure, appropriate, and transparent AI usage.

The result: faster reporting, deeper insights, and more time spent serving clients.



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## Contact our team today

See Report Studio in action or discuss how it can support your firm's reporting strategy.

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