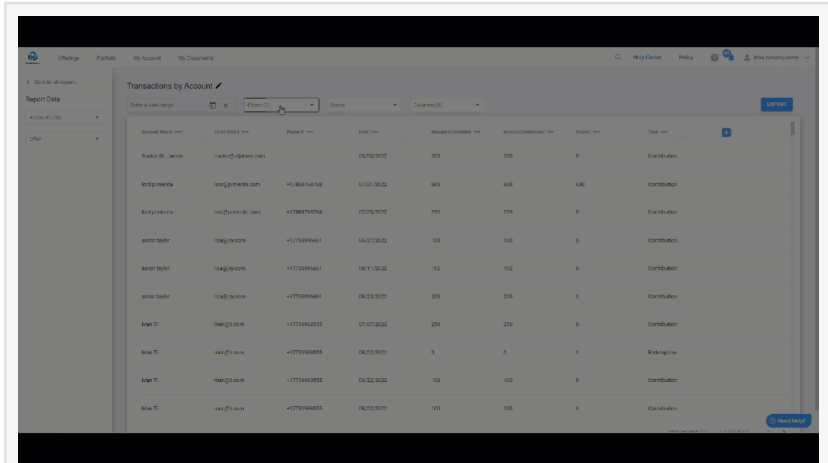


WealthBlock Introduces DIY Report & Dashboard Builder For Asset Managers and Fund Admins To Take Control Of LP Reporting

This new feature empowers everyone to easily create and distribute custom investor dashboards and reports without restrictions of any back-office systems.

CHICAGO, IL, UNITED STATES, October 7, 2022 /EINPresswire.com/ -- As [WealthBlock](https://www.wealthblock.com/)'s clients raise more capital from investors rapidly, efficient creation and distribution of internal and external reports have become an increasingly higher priority.



Account Name	Date	Amount	Type
Investment Account	10/01/2022	100	Contribution
Cash Account	10/01/2022	100	Contribution
Investment Account	10/01/2022	100	Contribution
Cash Account	10/01/2022	100	Contribution
Investment Account	10/01/2022	100	Contribution
Cash Account	10/01/2022	100	Contribution
Investment Account	10/01/2022	100	Contribution
Cash Account	10/01/2022	100	Contribution
Investment Account	10/01/2022	100	Contribution
Cash Account	10/01/2022	100	Contribution

How to create a transaction report

Modern investors have been demanding higher transparency and frequency of reporting from asset managers in order to understand and navigate their risks in real-time. The asset managers along with their fund administrators who can keep up with this demand have been rewarded with larger capital allocation.

“

With this approach, we allow the users to fully tap into their own creativity to fulfill their target audiences' needs without being restricted by tech vendors' own limitations.”

*Trilliam Jeong, CEO of
WealthBlock Inc*

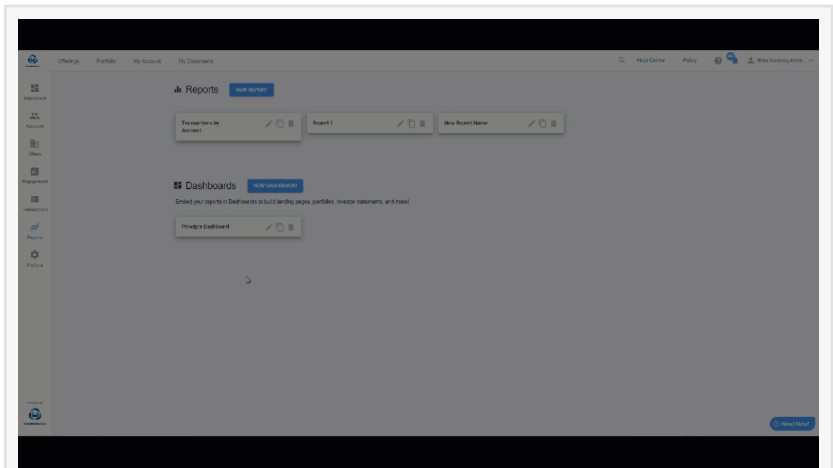
Further, while financial data are what investors are most interested in, combining both financial and non-financial data have proven to be effective for asset managers to improve investor satisfaction and increase follow-on investments. Therefore, the demand for better reporting from both internal and external users has never been higher.

Combined with the WealthBlock platform's built-in data collection & aggregation engine, this Report & Dashboard

Builder empowers everyone to create and distribute custom investor dashboards and reports without restrictions of any back-office systems. No matter what the data source or data type is, as long as it's in the WealthBlock platform, the Report & Dashboard Builder can make the data come to life via custom presentation and visualization. Meanwhile, real-time distribution is

always only a click away.

WealthBlock CEO, Trilliam Jeong, also talks a bit about the product inspiration: " The design of this feature is in line with our product philosophy of user empowerment. Instead of just introducing another report template, we want to provide the infrastructure and capability for the users to create their own reporting experiences. With this approach, we allow the users to fully tap into their own creativity to fulfill their target audiences' needs without being restricted by tech vendors' own limitations."



How to create a dynamic investor dashboard

ABOUT WEALTHBLOCK

WealthBlock builds white-label capital raising and investment management platforms for investment managers, wealth managers, and intermediaries in the private capital market. To date, over 150 firms have utilized WealthBlock's platform solution to raise over \$1 BIL in funding. The all-in-one digital platform has integrated all features and workflows in one place to fully digitize the entire investor journey from outreach to onboarding, then, to post-investment reporting.

WealthBlock Inc, a fintech firm started by a quant and a developer with innovation at its heart, is passionate about empowering people to create their own user experiences with data and automation.

WealthBlock PR
WealthBlock Inc
[email us here](#)

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