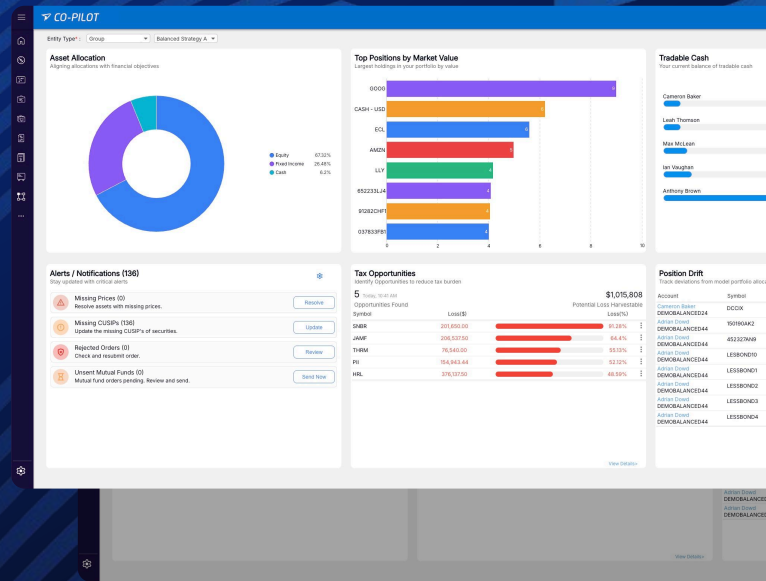


Manage smarter.
Grow faster.
Stay in control.



Co-Pilot Portfolio Management

Co-Pilot is a comprehensive platform for managing multi-asset portfolios with precision and ease. Designed for advisory solutions used by modern wealth managers, broker-dealers and the asset managers who serve them, it centralizes model management, UMA, portfolio rebalancing and compliance into a seamless experience.

The industry's leading brands trust Flyer to power their platforms' investment management technology and infrastructure.



Co-Pilot Portfolio Management Tools

Portfolio Intelligence & Analytics

- Persona based advisor dashboards
- Centralized trade desk requests
- Bond trading with live inventories
- Custom and home office models
- Position and tax lot views
- Basic to complex workflow configuration

Portfolio Intelligence

- Real-time intraday IBOR tracking
- 100+ custodian SOD integrations
- Live drift & target monitoring
- Real-time gain/loss explorers
- Multi-currency position support
- Customizable alerts

Model Management

- Multi-tier model-of-models
- UMA sleeve-level governance
- Automated model-drift analysis
- Full model revision audit trails
- Dynamic security substitutions
- 3rd-party sleeve-only access

Rebalancing & Cash

- Tax-sensitive household rebalance
- Automated cash-reserve rules
- Multi-security transition tools
- Sleeve-level cash controls
- Smart tax-loss harvesting
- Rep-as-PM and managed account support

Governance & Compliance

- Pre & post-trade rule engine
- Scalable order review flows
- Full compliance audit logs
- Advisor-to-trader workflows
- Granular account-level access
- Secure firm-defined fields

Contact sales to schedule a demo

Watch our video to learn more!

