

## TELEMET QUARTERLY NEWSLETTER SEPT 2022



### Message from the CEO

Greetings to All,

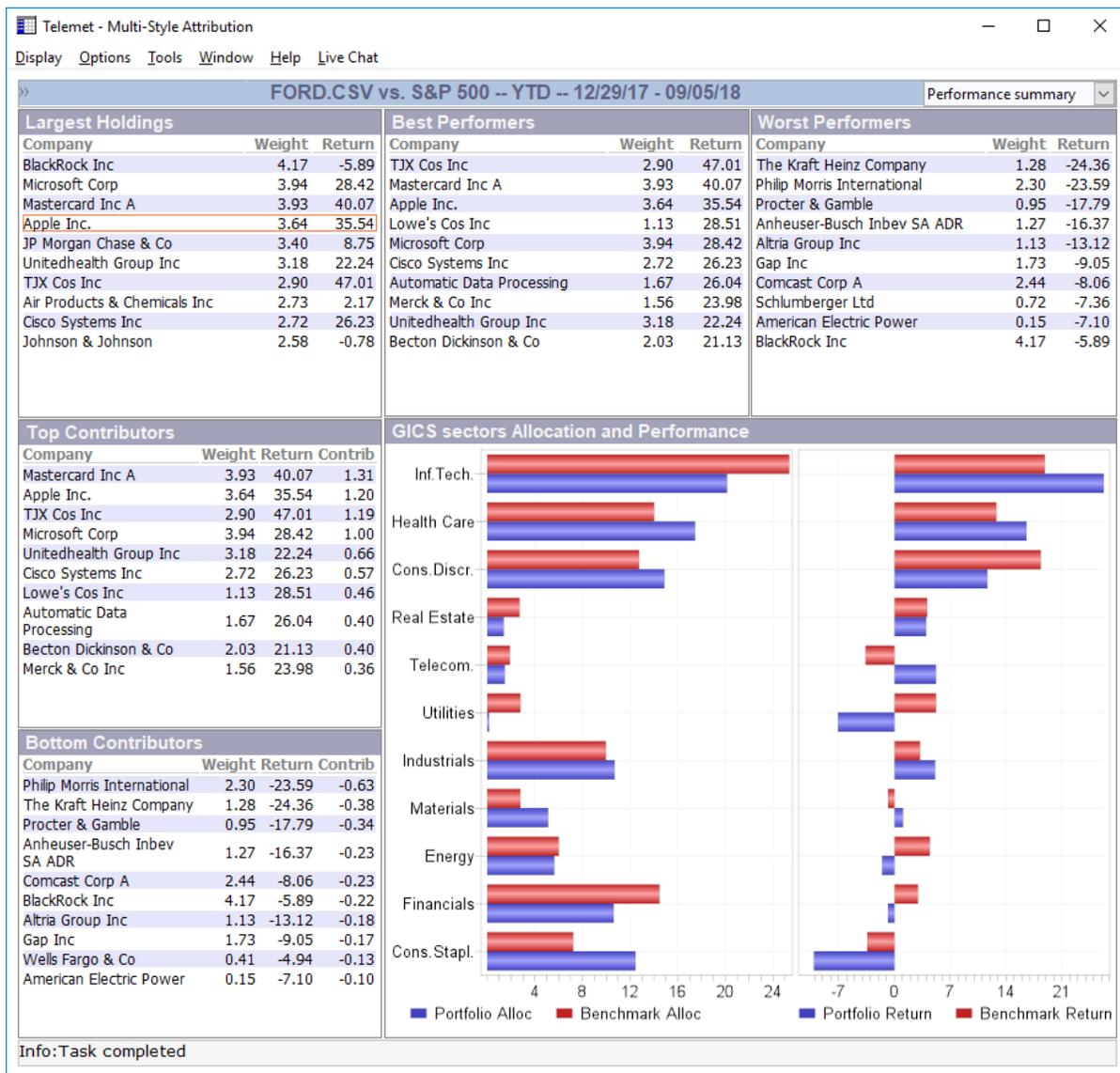
In this newsletter we announce a new Telemet version.

Telemet has updated links to Orion Advisor and added new links to Fidelity Wealthscape. This means you can perform portfolio attribution and see real-time prices from these portfolios in your Telemet.

I want to thank you for your business and wish all of you a safe and comfortable 4Q 2022.

Regards,

Fred Parsons, CEO



## Fidelity Wealthscape transactions link with Telemet

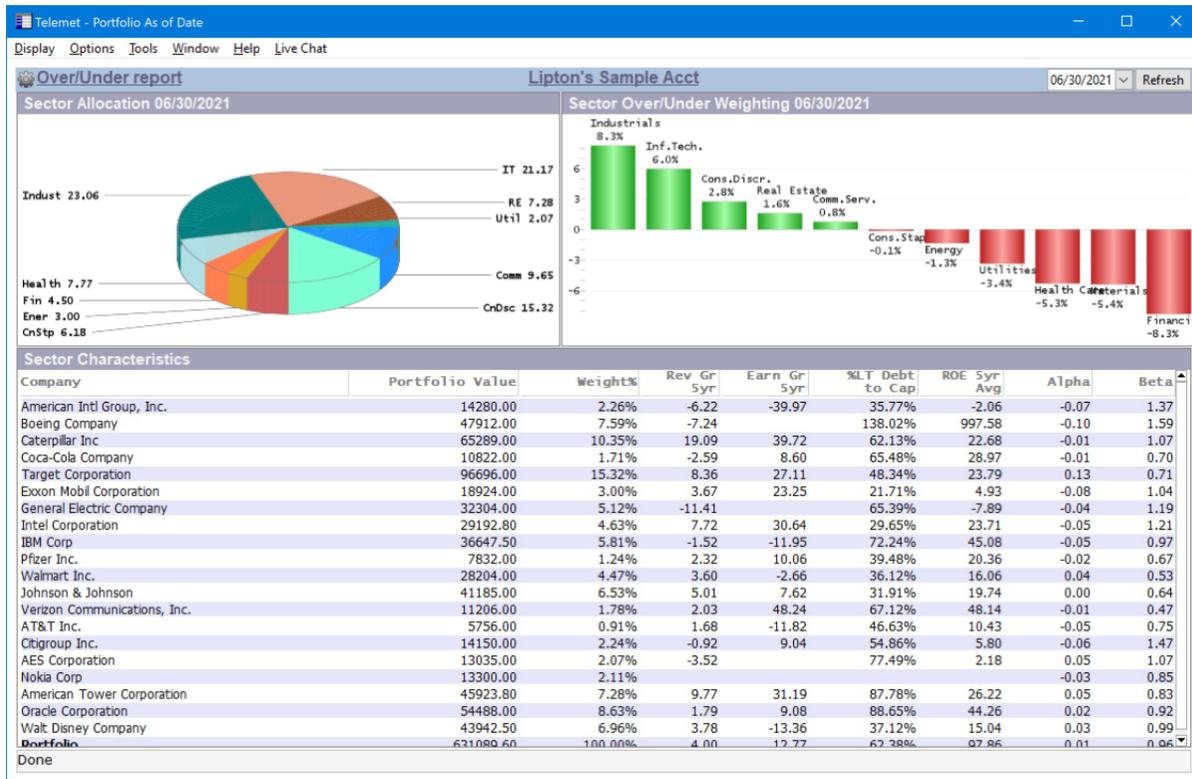
Our clients have been requesting a link to Fidelity Wealthscape so that holdings and transactions from those portfolios may be viewed and analyzed on Telemet.

Once holdings are in Telemet, create transaction-based, portfolio attribution reports. These reports are useful management and marketing tools. They show performance by sector and security against a benchmark. The dozen reports illustrate such things as portfolio weightings versus the benchmark, portfolio characteristics versus the benchmark and stock selection and sector performance results.

Select any of several benchmarks including the widely popular S&P 500, and many from Russell. Pick the time periods for analyses, including YTD, QTD

and custom periods.

To access these reports, select the "Display" menu item, then select "Portfolio Analytics", then select "Multi-style Attribution". Please contact our client support team for more information on the links to Fidelity Wealthscape.

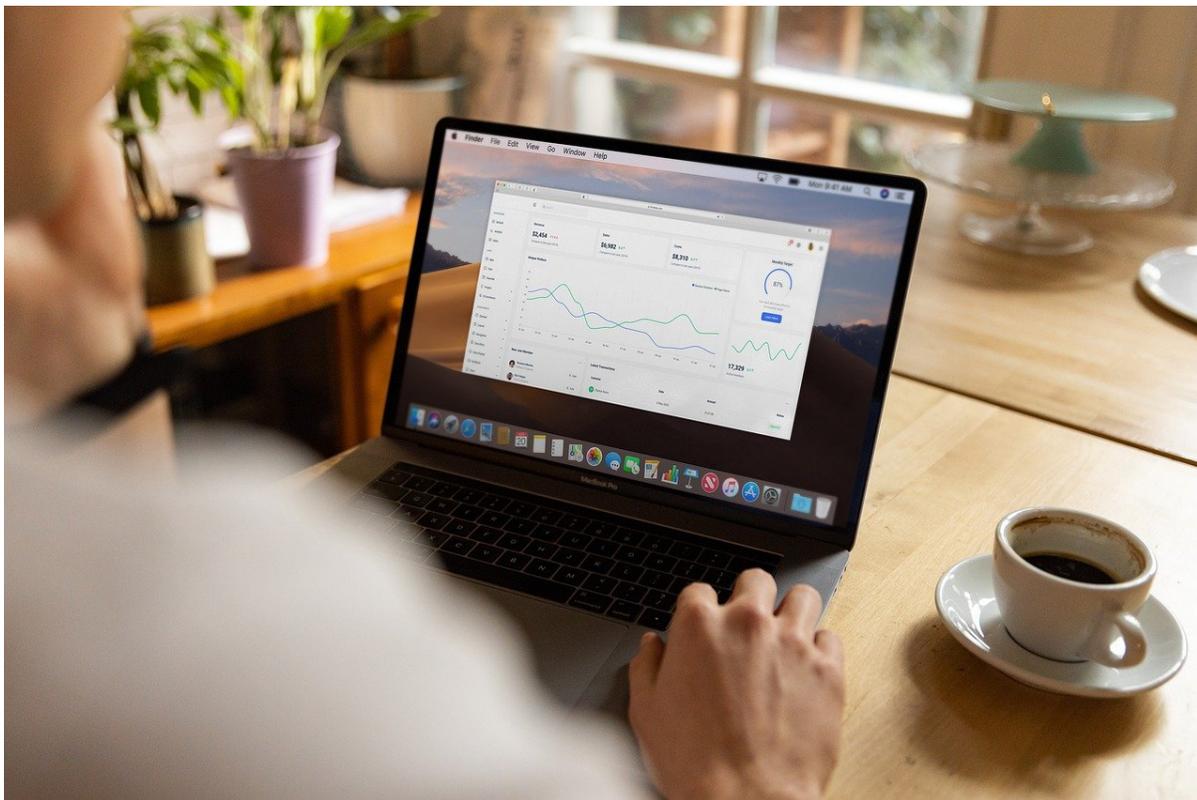


### Other Portfolio Management Platform links on Telemet

As a reminder, Telemet has links to many Portfolio Management platforms. Here is a list of some of the more popular ones in no particular order.

- SS&C Advent Axys
- SS&C Advent APX
- Black Diamond
- Fidelity Wealthscape
- InData
- Orion Advisor
- Portfolio Center
- Tamarac

If you don't see your PM platform on the list, contact our client service team for more information.



## Replicating your Telemet Workspaces

You have likely spent time creating favorite workspaces for your office PC. You can easily transfer these to your home-office computer or for your team's PCs. To pass these favorite workspaces on for others to use, or for your home-office computer, you can use "Replicate". Remember there is no added charge to use Telemet anywhere, just make sure your Telemet is running with your login credentials on one device at a time.

The "Replicate" function is also useful when you perform an upgrade to a newer version of Telemet as backup insurance to preserve your favorite workspaces.

Run "Replicate" from the "Tools" menu. A replication file (Orion.zip) is created by this step and saves all your settings and lists so there will be little effort restoring your configuration (use "Import/Replication Files"). In addition, you can take the Orion.zip file to another computer to replicate workspaces there - such as on a home-office computer or another computer in your office.

Replications may be set up to run weekly or may be run at your convenience. If you need help on how to do any of this, just contact client service. Email [support@taquote.com](mailto:support@taquote.com) or call 800-368-2078 for comments or questions.

## Switching Servers?

Some clients have called in IT teams to switch services to the "cloud". This means downloading all Telemet software. If you decide to do this, please contact client services (800-368-2078) before the change is made, so we can help make sure it all goes smoothly. Thanks!

### Important Links

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- [Telemet Orion Latest Version v8.2.06.10 dated 8/10/22](#) - Select Telemet Orion software
- [Televista for Advent Axys v 2.5.40 dated 9/4/20](#) select compatible software
- [Televista for Advent APX v1.5.31 dated 9/4/20](#) Select compatible software
- [Telemet QuoteService Standard Version v1.0.3.0](#) - Select compatible software
- [TeleFlash Proprietary Data Publisher v1.3.3.8](#) - Select compatible software
- March [2022 Newsletter](#)
- June [2022 Newsletter](#)



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