



## **Ariel Investments Automates Client Reporting and Sales Content with Assette**

**BOSTON, MA, UNITED STATES, MAY 25, 2023** – [Ariel Investments](#), a global value-based asset management firm is using [Assette](#) software to automate their client statements and sales materials. With Assette, Ariel is combining a secure, single source of data with the tools needed to create, approve, and deliver high-quality client and sales content.

With more than \$17 billion\* in assets under management (AUM) and a 40-year track record of delivering value to their clients, Ariel's client and sales communication needs are complex, yet critical to operations.

For Ariel, providing timely insights and a personalized client experience is essential. Assette software helps the firm meet this need by automating intelligent processes that create, approve, and deliver client and sales content. The software uses a low-code approach, empowering the firm's marketing and client service teams with access to the data they need with built-in workflow tools for review and delivery.

"Assette software is simple, intuitive, and easy to use," said, Jennifer DiGrazia, Senior Vice President, Head of Institutional Client & Investor Relations, Ariel Investments. "It allows us the flexibility to innovate with our content, drive efficiencies, and produce highly customized client reports in a timely manner at scale."

Ariel is joining the growing number of asset management firms selecting Assette to put their data to work to create up-to-date, accurate, and customized client and sales content. Assette software automates the data enablement, content creation, approval, and delivery of a firm's sales and client materials using their data platform of choice. Purpose-built for asset management, Assette software makes investment data accessible and easy to use, improving productivity for marketing, client service, and sales teams.

*\*As of March 31, 2023.*

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### **About Assette:**

Headquartered in Boston, MA, Assette automates the data enablement, content creation, approval, and delivery of an asset management firm's sales and client content using their data platform of choice. From the first contact with a prospect to sharing perspective with long-standing clients, firms can create, approve, and deliver [sales materials](#), [client reports](#), [investment commentary](#), [portal](#) communications, [DDQs](#), and more in Assette software. For more information: [www.Assette.com](http://www.Assette.com)

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