



End to End Wealth Management

Become the hub of your client's financial life

CRM — Data Aggregation — Daily Reconciliation — Billing — Reporting — Trading — Account Opening / Client Onboarding — Client Portal

Data Aggregation

Import data from over **6000** unique financial service providers

Upload Data

Upload formatted data to over **1500** financial analysis tools and websites

Consolidate Reporting:

- Investment accounts with any custodian
- Automated & Reconciled DST Downloads
- 401k and other retirement acct's.
- Life Insurance
- Annuities
- Bank accounts

Sample Supported Interfaces:



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