



Tamarac Advisor Xi[®]

[Home](#) > [Software](#) > [Advisor Xi](#)

Integrated RIA Platform

A recent Aite Group[®] study has shown that firms using an integrated technology platform like Advisor Xi—on average—manage twice the assets, produce \$100,000 more in revenue, and their advisors earn 20 percent more in annual income compared to firms with no integration.

Advisor Xi is an integrated web-based platform designed specifically to address the needs of today's independent registered investment advisor (RIA). Advisor Xi deeply integrates leading portfolio management, performance reporting, billing, rebalancing, and trading software with an online client portal and an enterprise-level CRM. While components of Advisor Xi may be purchased separately, the complete solution delivers dramatic gains in efficiency, client satisfaction, compliance, and overall profitability.

Advisor Xi uniquely integrates:

Advisor View™

An elegant portfolio management and performance reporting application, offering portfolio analysis, personal dashboards, customizable PDF reports, and powerful billing capabilities. The included client portal engages clients online by dynamically presenting portfolio performance and by providing a platform for secure document exchanges and online communications.

Advisor Rebalancing®

The industry's leading premium rebalancing application, offering advanced model portfolio management, monitoring, rebalancing, trading, real-time pricing, and post-trade reconciliation. Rebalance thousands of accounts and households in minutes.

Advisor CRM®

Client relationship management for investment advisors and a central integration point for the Advisor Xi suite. Accessible via the web and integrated with Microsoft Outlook[®], built on the trusted Microsoft Dynamics[®] CRM platform, and designed around an advisor's client lifecycle. Gain deep business insights with included business intelligence reports. Integrates information and functionality with Advisor View, Advisor Rebalancing, and a growing list of third party applications.

Outsourced Portfolio Accounting Services

Free your staff from daily reconciliation and cost basis calculations and let Tamarac Advisor Services[®] take on the detail work. Reconciled accounting data is seamlessly shared across the Advisor Xi suite, allowing your staff to focus on client-facing and revenue-generating activities, armed with up-to-date information.

Third Party Integrations

Advisor Xi is deeply integrated with other leading financial software applications in areas such as documentation management, financial planning, account aggregation, electronic form submission, and more.

Custodial Platforms

Advisor Xi supports financial accounts held at most any custodian. In addition, Tamarac is developing deep integrations with custodial platforms to provide real-time data and straight-through processing of trades. Custodial platforms include Schwab Intelligent Integration[®], Pershing NetX360[®], and TD Ameritrade Veo[®] – with more platforms being added.

We really look at Tamarac as a strategic partner to our business. We think of Tamarac as thought leaders because they are always looking for innovative products and solutions to better service clients. And that's exactly how we view our business.

Brent Burns, President and Co-Founder
Asset Dedication

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Sept 19, 2013

[Investnet | Tamarac™ Adds Powerful Business Intelligence Reporting to Advisor Xi® Practice Management Platform](#)

Jun 24, 2013

[Investnet | Tamarac™ Advisor Rebalancing Application to be Added to Schwab Open Gateway™ CRM](#)

Upcoming Events

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September 23-25, 2013

[Tamarac University, Seattle, WA](#)

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