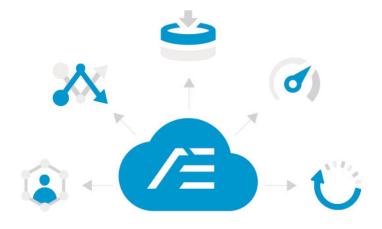


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Keep using your favorite existing technology solutions

Our technology is wide open – we work the way you work





CUSTODIANS

We work across different custodians so that you can run your business your way. We are integrated today with several leading firms, with more on the way:

- Pershing
- TD Ameritrade Institutional
- Charles Schwab
- Fidelity
- Others (Coming Soon)



ACCOUNT AGGREGATION

We help financial advisors deliver holistic advice by providing full financial visibility for clients across 14,000 financial institutions:

• Quovo

CRM



Our CRM integrations enable seamless account management across different client types and households:

- Redtail
- Salesforce
- WealthBox
- Junxure



INVESTMENT DATA + ANALYTICS

We partner with innovative analytics companies who are democratizing access to institutional quality analytics:

- FinMason
- · IDC
- S&P



TRADING & REBALANCING

We provide tax-smart portfolio optimization and automated rebalancing options that scale across different firm setups and trading styles:

- iRebal
- Smartleaf
- Orion

