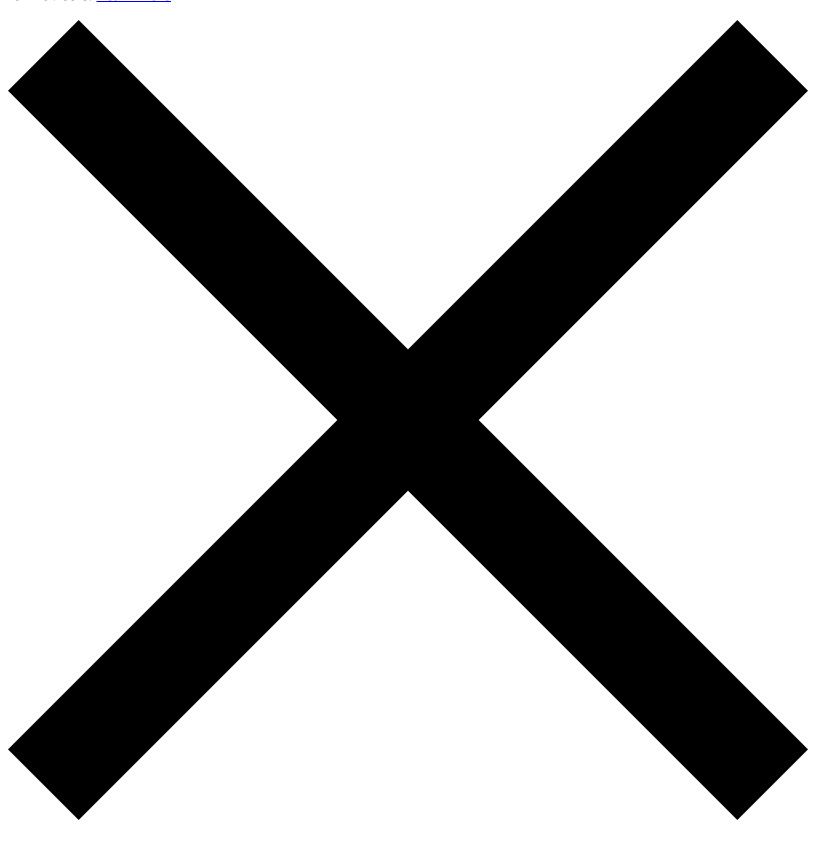
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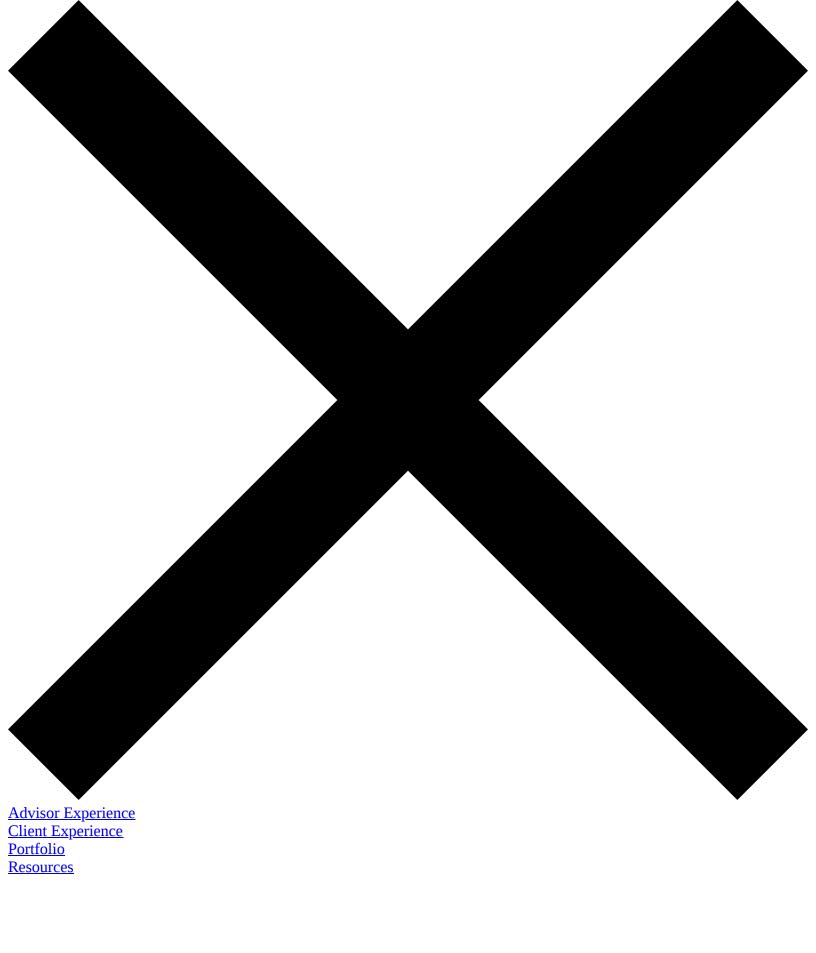
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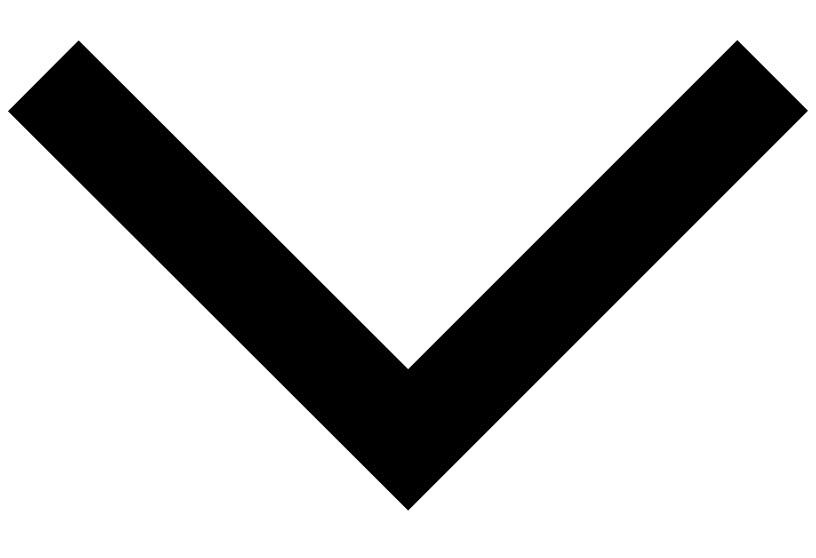
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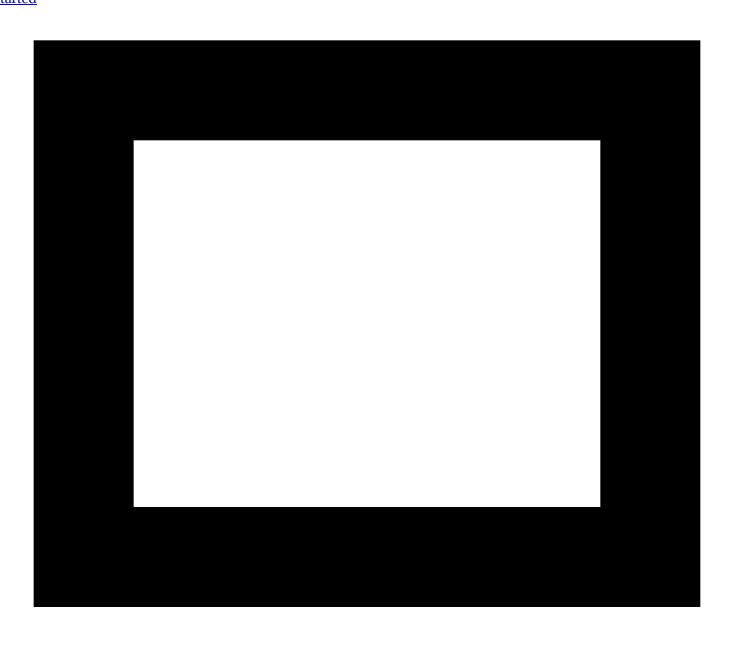
Get started

Meet your

technology

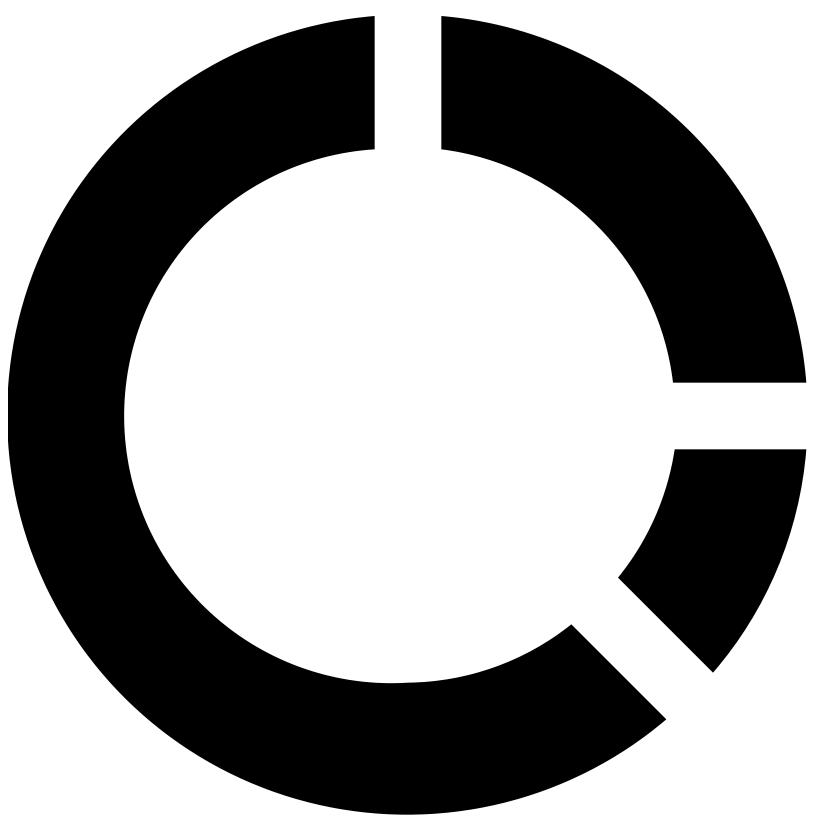
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Get started



Account opening in minutes

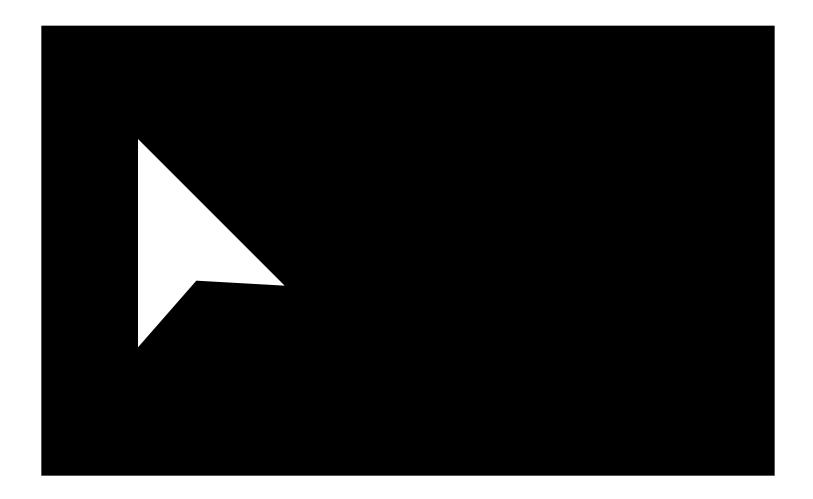
Open accounts with your clients without cumbersome paperwork.



Automated trading and tax management

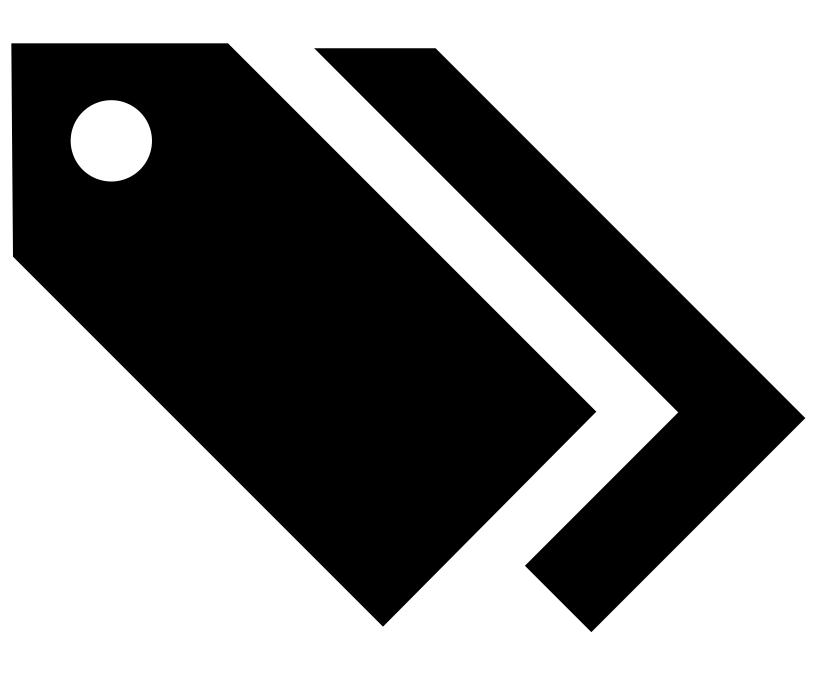
Fully automated rebalancing, tax loss harvesting, and asset location.





Intuitive client dashboard

Give your clients a fully digital and transparent investing experience.



No additional trading fees

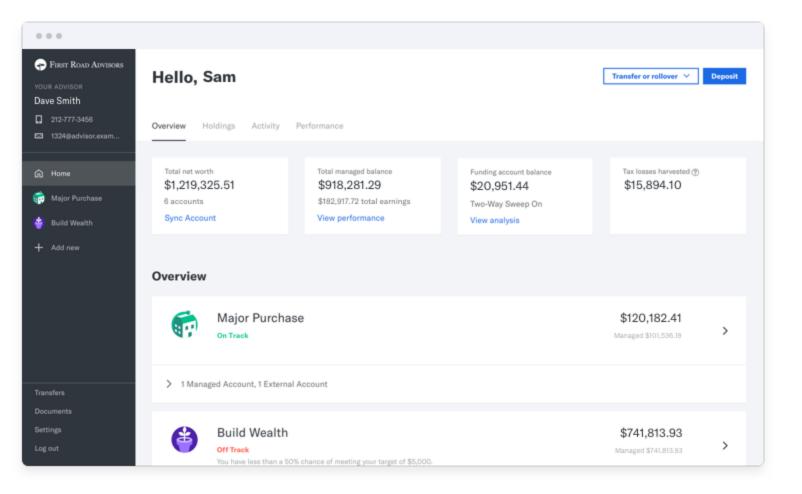
Adjust your clients' allocations without trading fees.

Streamline your back office.

Time you spend doing paperwork and tedious tasks is time you aren't spending building client relationships and your business. Our technology does the trading, paperwork, and billing so you don't have to.

Learn more





Automate portfolio management.

Our tax-efficient technology automates trading and portfolio management tasks—including rebalancing, tax loss harvesting, asset location, deposits, and withdrawals—to help maximize your clients' investments.

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Delight your clients.

Give your clients smart technology for their investments. Our platform enables your clients to see their investments in one place, track their progress, and make smart financial decisions alongside your guidance.

Learn more



"Will help advisors by eliminating or combining many traditionally cumbersome tasks."

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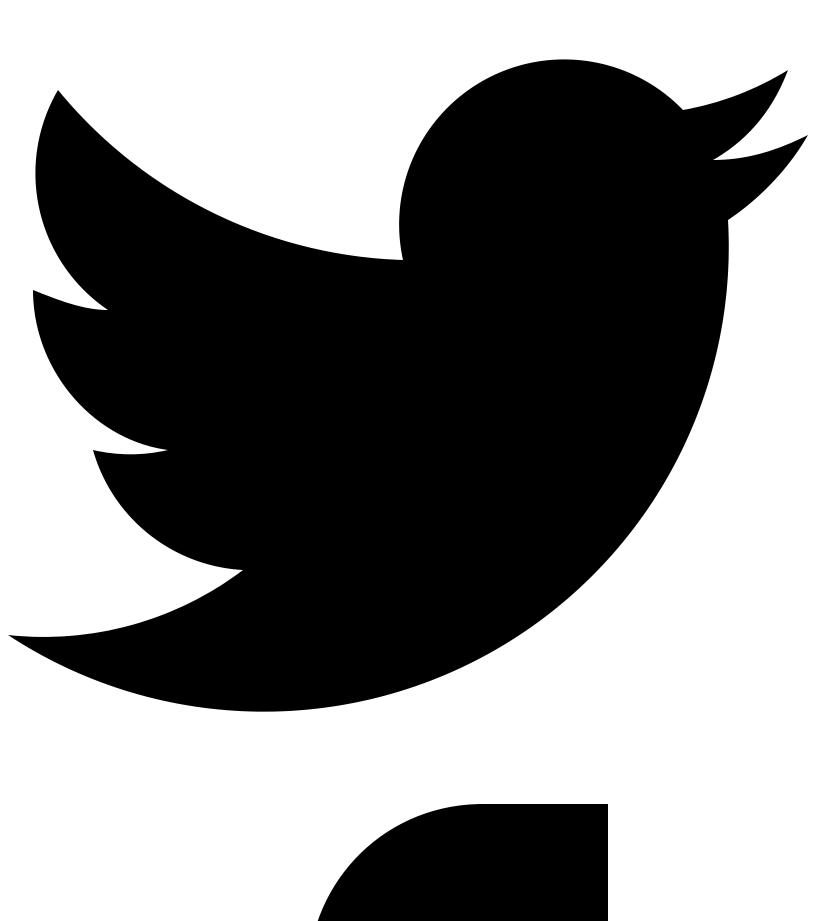
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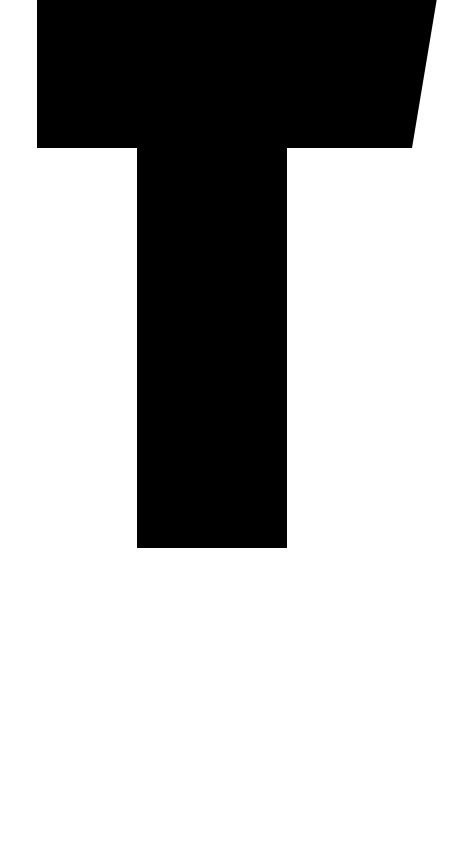
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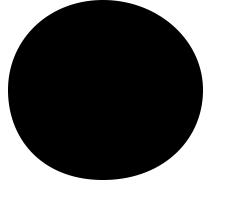
Looking out for investors' accounts is a legal duty.

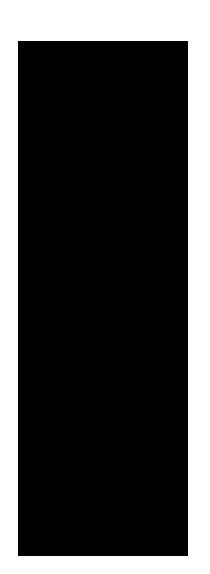
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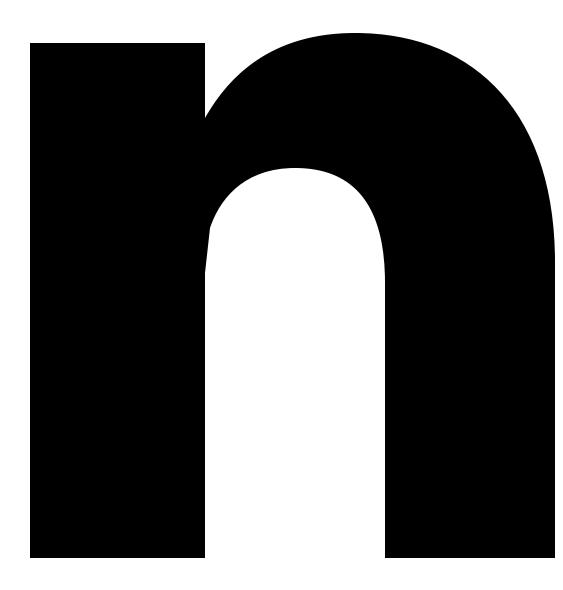
Advisor Experience
Client Experience
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