

FUSION: TradePMR's top-rated custodial platform for RIAs¹

From digital onboarding to flexible account management, coupled with advanced trading capabilities and integrations with dozens of wealth management technology providers, Fusion is a comprehensive platform designed for growing Registered Investment Advisors.

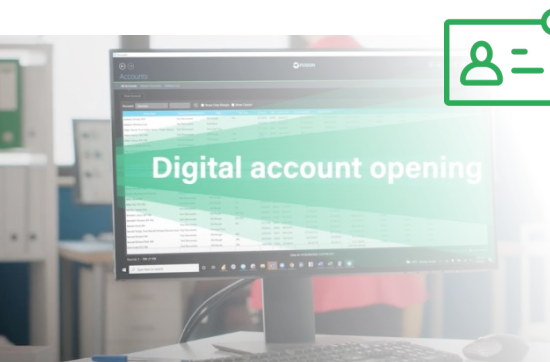
RIAs working with TradePMR can now access the platform from any desktop, tablet or mobile device to experience the reimagined user experience, expanded trading capabilities, and a secure Message Center – all released in 2023.



Expansive Trading Capabilities

Leverage simple and advanced trades across your entire book of business, including:

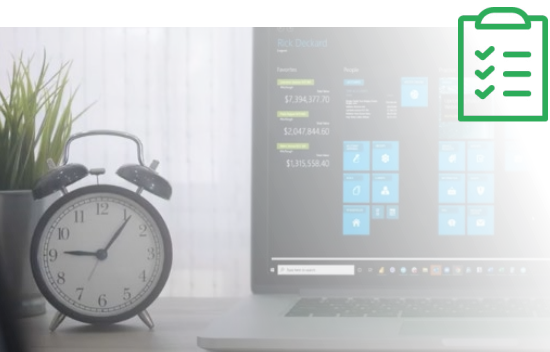
- Single Trades
- Position Trades
- Rebalancing via Baskets
- Models and Model Sleeves
- Order Management



Streamlined Account Opening

Open a broad range of account types within Fusion in a matter of minutes:

- Dynamic applications to track progress and identify missing fields.
- Submit applications with wet or e-signatures, including a comprehensive DocuSign integration.
- *Recently Released:* Phone authentication via DocuSign for new account opening.



Transparent Service Requests

Get the support you need when you need it:

- Submit requests spanning general account support, asset movement, fees, trading, and more.
- Easily track where requests stand, including status and who is tackling the request.
- Provide any necessary updates to requests via the secure two-way Fusion Message Center.



Comprehensive Integrations

Build a streamlined tech stack with Fusion’s integration network:

- Deep integrations with RIA industry vendors.
- Nimble technology team to quickly develop integrations with new vendors.
- Integration types include API, data feed, FIX, and single sign-on.

Single platform with seamless integrations



Integrations



FAQs

To answer your burning questions about TradePMR, [check out our FAQs.](#)



My Demo

Ready for a Fusion demo?
[Let's connect.](#)



TradePMR

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Technology and Custodial Services to Help RIAs Succeed

Questions? Email Sales@TradePMR.com or visit TradePMR.com to learn more.