

Unlock Your Access to the Moneyball for AI: How Wealth Management Firms Can Get The Most Bang for Their AI Bucks Webinar.
(<https://ezragroup.com/moneyball-for-ai-july-2024-registration/>)

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536

TOTAL NUMBER OF
APPLICATIONS SCORED

EZRA GROUP WealthTech Integration Score

View each vendor's integration score.

4.25

MEDIAN INTEGRATION
SCORE

Learn more about our proprietary scoring methodology
(<https://ezragroup.com/wealthtech-integration-scores/overview/>)



4,364

TOTAL NUMBER OF
INTEGRATIONS

or

Custodial Platform

Integration Score

0 1 2 3 4 5 6 7 8 9 10

1	TradePMR	7.86
2	Equity Advisor Solutions	7.32
3	Schwab Advisor Services	7.05
4	SEI Wealth	6.47
5	Axos Advisor Services	6.09
6	LPL ClientWorks	6.02
7	Fidelity Wealthscape	5.68
8	SSG Institutional	5.60
9	Apex Clearing	5.55
10	Interactive Brokers - C	5.33
11	Pershing NetX360	5.06
12	AssetMark	4.98
13	Altruist	4.62
14	Betterment For Advisors	4.07
15	RBC Black	3.54
16	Raymond James	3.51
17	Goldman Sachs (Folio)	2.28
18	Equipt	0.00
19	Cetera AdviceWorks	0.00
20	Entrustody	0.00

Top 10 Categories Viewed

- CRM (/wealthtech-integration-scores/?category=18&category_name=CRM#search_bar)
- Custodial Platform (/wealthtech-integration-scores/?category=19&category_name=Custodial Platform#search_bar)
- Document Management (/wealthtech-integration-scores/?category=23&category_name=Document Management#search_bar)
- Investment Data/Analytics (/wealthtech-integration-scores/?category=28&category_name=Investment Data/Analytics#search_bar)
- Financial Planning (/wealthtech-integration-scores/?category=26&category_name=Financial Planning#search_bar)
- Performance Reporting (/wealthtech-integration-scores/?category=33&category_name=Performance Reporting#search_bar)
- Portfolio Management (/wealthtech-integration-scores/?category=35&category_name=Portfolio Management#search_bar)
- Rebalancing Only (/wealthtech-integration-scores/?category=37&category_name=Rebalancing Only#search_bar)
- Risk Tolerance (/wealthtech-integration-scores/?category=39&category_name=Risk Tolerance#search_bar)



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527 witz elB

240) OPs

8) dC

XU

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