










# An RIA's Guide to Integrations, API, SSOs and Services.

TradePMR leverages integrations and partnership options with a wide variety of industry leading vendors. Below is a quick guide to how their offerings interact with TradePMR and the Fusion platform. **Don't see your favorite integration below? *Not a problem, let's talk.***

| Category                                   | Product   | Notes   | SSO | Status | Data Import               |
|--|---|---|-----|--------|---------------------------|
| Data Aggregation and Analytics             |  <b>ADDEPAR</b>  | Platform that aggregates portfolio, market and client data.   | No  | +      | N/A                       |
| TAMP Solution                              |  <b>Adhesion wealth</b>  | TAMP solution that provides outsourcing of managed accounts.  | No  | *      | Data Feed                 |
| Wealth Management Platform                 |  <b>AdvisorEngine</b>  | Full-service wealth management platform providing a client portal, CRM, portfolio management & digital onboarding.  | N/A | *      | Data Feed                 |
| Wealth Management Platform                 |  <b>Advyzon</b>  | Platform providing portfolio management, client reporting, billing, CRM, client portal, and secure document management.   | No  | *      | Integration/<br>Data Feed |
| AI   |  <b>benjamin</b>   | Business support system which integrates the software tools and data used by advisors and their teams.  | N/A | +      | N/A                       |
| Performance Reporting                      |  <b>SS&amp;C   Black Diamond</b>   | Customizable and comprehensive performance reporting software with client portal.   | Yes | *      | Integration/<br>Data Feed |
| Data and Business Intelligence             |  <b>Broadridge</b>   | Provider with multiple business lines offering technology, infrastructure, and data to support a broad range of financial services organizations  | N/A | *      | Data Feed                 |
| Bonds                                      |  <b>SUMRIDGE PARTNERS</b>   | Fixed income market-maker, specializing in high yield and investment grade corporate bonds, municipal bonds, institutional preferred securities (\$1000 par), emerging market bonds, and non-agency mortgage backed securities.                                   | Yes | *      | Integration               |
| Market Quotes and Bond Trades              |  <b>ICE</b>  | Market information platform offering real time & delayed quotes, market data, and bond trade execution  | No  | !      | Integration               |
| Compliance                                 |  <b>CSS</b><br>Compliance Solutions Strategies                               | Comprehensive support for RIA compliance solutions Provider offering a range of financial services and advice to individuals, corporations, institutions and municipalities, including wealth management, trust services, fixed income capital markets, and more. | N/A | *      | N/A                       |
| Transition Assistance                      |  <b>FP TRANSITIONS</b><br>M&A   VALUATION   CONSULTING   MEMBERSHIP SERVICES | Provider offering asset and business transition assistance for RIAs.  | N/A | *      | N/A                       |
| Transition Services                        |  <b>MYRIAD</b><br>ADVISOR SOLUTIONS  | Transition services for RIAs on-the-move  | N/A | *      | N/A                       |
| Alternative Investments                    |  <b>MILLENNIUM TRUST COMPANY</b>   | Provider offering custody and trust solutions for RIAs.   | No  | *      | N/A                       |
| Full-Service Platform, Performance Reports |  <b>MORNINGSTAR</b>  | Morningstar Report, Morningstar Screeners, and the Portfolio Snapshot report. Morningstar QuoteSpeed rounds out this powerful collection of resources designed to give advisors the industry leading tools they need to be more successful.                       | No  | *      | Data Feed                 |
| Retirement Plan Solutions                  |  <b>PCS</b><br>PCSAIts.com   | Provider offering turnkey retirement plan solutions   | N/A | !      | N/A                       |
| CRM  |  <b>REDTAIL</b>  | CRM provider for RIAs.  | Yes | *      | N/A                       |
| Compliance and Cybersecurity Solutions     |   | Provider of cyber security, cloud-based technical solutions, compliance assistance, IT management and backup and recovery solutions.  | N/A | +      | N/A                       |
| Risk Management                            |  <b>riskalyze</b>  | Provider for RIAs to review and assess portfolio risk.  | Yes | *      | Data Feed                 |
| Insurance & Benefits                       |  <b>STARKWEATHER &amp; SHEPLEY</b><br>INSURANCE BROKERAGE INC.               | Insurance and benefits solutions provider.  | N/A | *      | N/A                       |
| Insurance                                  |   | Errors & Omissions insurance for independent RIA firms.   | N/A | *      | N/A                       |
| Insurance                                  |  <b>BIBBINS &amp; BUCKLEY</b>  | Provider offering RIA insurance solutions.  | N/A | *      | N/A                       |
| Portfolio Management Platform              |  <b>ALBRIDGE</b>   | Web based portfolio accounting and performance reporting solution.  | No  | *      | x                         |
| Financial Planning                         |  <b>MoneyGuidePro</b>  | Financial planning software that is easy and intuitive, with an optional Client Portal available.   | Yes | *      | x                         |
| Financial Planning                         |  <b>eMoney</b>   | Financial planning software that features a Client Portal and robust planning options for financial advisors.   | No  | *      | x                         |
| Financial Planning                         |  <b>RightCapital</b>   | Financial planning software that transforms complexity into clarity with ease, precision and dynamism.  | No  | *      | x                         |
| Financial Planning                         |  <b>Wealth Tec</b>   | Financial planning platform with estate planning components for financial planning professionals.   | No  | *      | x                         |
| Financial Planning                         |  <b>ENVESTNET</b>  | Data-fueled ecosystem of services, products, tools, and technologies that gives advisors a powerful, unified perspective of their clients' finances.  | No  | *      | x                         |
| Full Service Platform                      |  <b>ORION</b>  | Full service platform with an array of products including trading, billing, rebalancing and client portal   | Yes | *      | x                         |
| Full Service Platform                      |  <b>blueleaf</b>   | Blueleaf combines reporting, communication, and automation technologies to create a system that is one of the most powerful, yet simplest to run on the market.   | No  | *      | x                         |
| Full Service Platform                      |  <b>Vestmark</b>   | A la carte menu of solutions that meet needs large and small including trading, accounting, rebalancing and portfolio construction and management.  | No  | *      | N/A                       |
| Full Service Platform                      |  <b>FinFolio</b>   | Full service platform providing billing, performance reporting, rebalance tools and a client portal.  | No  | *      | x                         |
| Market Research                            |  <b>ARGUS</b>  | Powerful research tools for RIAs .  | Yes | *      | x                         |
| Market Research                            |  <b>YCHARTS</b>  | Accurate data and analytics to help financial advisors make better decisions.   | Yes | *      | x                         |
| Options Research                           |  <b>OptionsPlay</b>  | Powerful tools that make options understandable for novice investors while providing the edge experts demand.   | Yes | *      | x                         |

| Status Key                  |
|-----------------------------|
| * Currently Available       |
| ! Coming Soon               |
| + Under Review <sup>1</sup> |

Questions? Email [Sales@TradePMR.com](mailto:Sales@TradePMR.com) or visit [TradePMR.com](http://TradePMR.com) to learn more.



<sup>1</sup> Requirements gathering for future rollouts.

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