ENVESTNET® Tamarac®

ADVISOR® Xi

THE MOST COMPREHENSIVE RIA PLATFORM

ADVISOR® XI

THE MOST COMPREHENSIVE RIA PLATFORM

Tamarac Advisor® Xi is the only web-based, custodian-agnostic platform that deeply integrates best-in-class portfolio and client management software—and it's specifically designed for independent RIAs and their clients.

Advisor Xi is an open platform with a growing list of industry-leading integration partners. Tamarac continually enhances and supports these integrations, saving you time and maximizing the benefit to your firm.

Powerful client engagement capabilities, such as your firm's own branded client portal and iPad app, give your firm a competitive advantage in the evolving mobile marketplace. Using Advisor Xi, you will capture more mindshare and assets from your current clients, their next generation, and the growing pool of millennial investors.

Each application in our suite is a leader in its category and will scale to meet the needs of RIA firms of any size, from $25M to over $25B in assets under management (AUM).

ADVISORS AT FIRMS THAT HAVE SOME INTEGRATION EARN APPROXIMATELY 20% MORE IN ANNUAL INCOME.*

*AITE GROUP. (2013). RIA RODUCTIVITY AND PROFITABILITY: INTEGRATION PAYS.

ADVISOR VIEW™

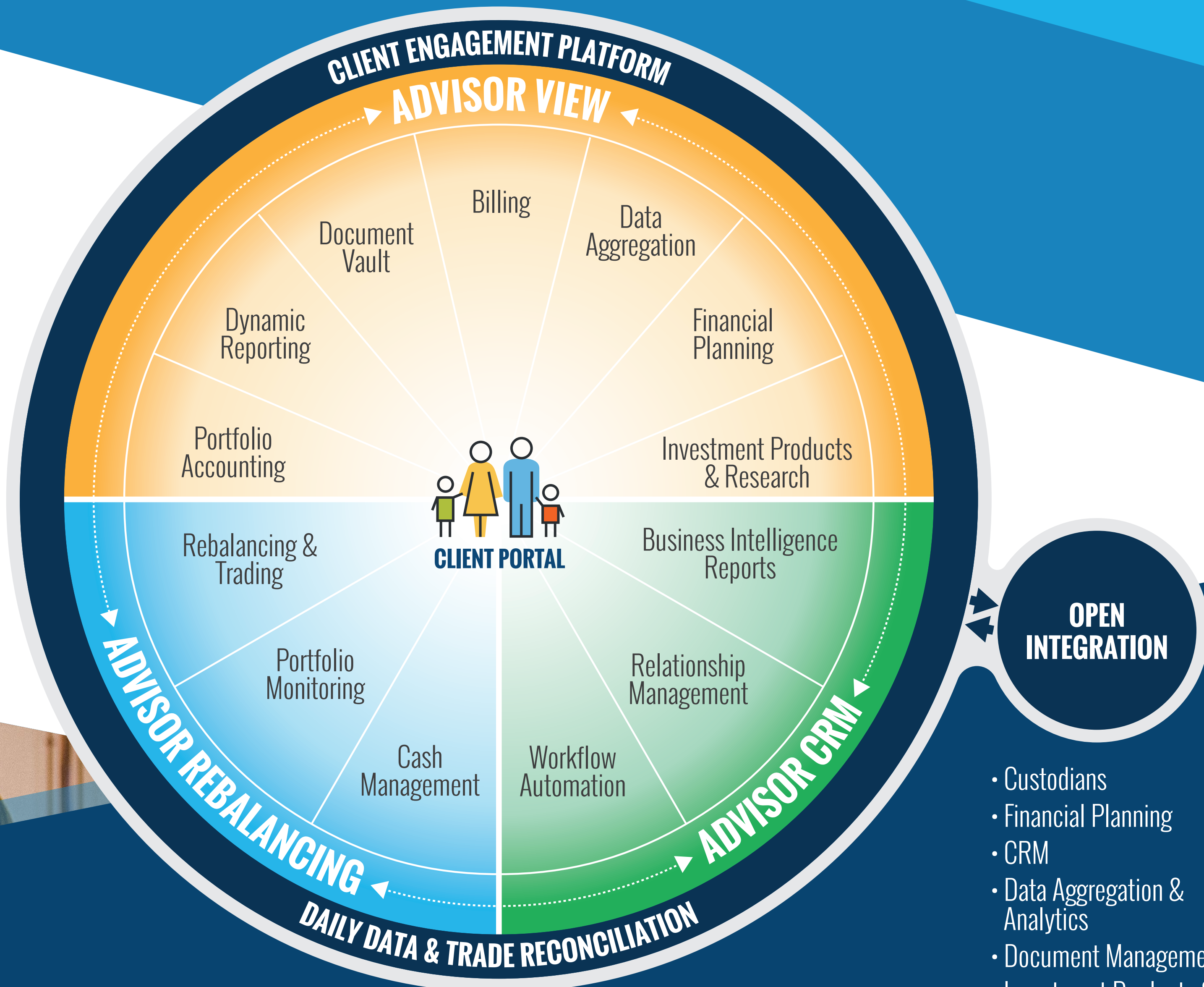
An elegant portfolio management and performance reporting application that offers portfolio analysis, unique "percent of ownership" reporting, personal dashboards, customizable PDF reports, flexible billing capabilities and access to investment products and research. The integrated client portal and the iPad app enable your firm to competitively engage clients online and through their mobile devices. Built in account aggregation and net worth reporting provides you and your clients with a complete picture of their wealth – all in a single location.

ADVISOR REBALANCING®

The industry's premium portfolio monitoring, trading, and rebalancing application, with advanced modeling, real-time pricing, straight-through execution of trades, and post-trade reconciliation. Easily look across thousands of households in seconds for custom trading triggers and identify whether any accounts require action.

ADVISOR CRM®

Our client relationship management solution for independent RIAs, and a central integration point for the Advisor Xi suite. Built on the trusted Microsoft Dynamics® CRM platform, Advisor CRM is designed around an advisor's client lifecycle, is accessible via the web, and is integrated with Microsoft Outlook®. Gain deep business insights with included business intelligence reports that uniquely pull data from across the Advisor Xi platform and a growing list of third party integration partners. Advisor Xi also supports Salesforce.



- Custodians
- Financial Planning
- CRM
- Data Aggregation & Analytics
- Document Management
- Investment Products & Research

DAILY DATA AUDITS & TRADE RECONCILIATION

Free your staff from daily reconciliation and cost basis calculations and let Tamarac Advisor Services® take on the detail work. Reconciled accounting data is seamlessly shared across the Advisor Xi suite, allowing your staff to focus on client-facing and revenue-generating activities, armed with up-to-date information.

THIRD PARTY INTEGRATIONS

Advisor Xi is an open platform with an available application program interface (API) for qualified vendors. Tamarac handles the integration, enhancements, and support for each third-party partner so that your firm can focus on servicing your clients. Advisor Xi has meaningful integration with vendors in the areas of financial planning, data analytics, account aggregation, custodial platforms, document management, CRM systems, and more.

CUSTODIAL PLATFORMS

Advisor Xi supports financial accounts held at most custodians. Tamarac is constantly strengthening integrations with custodial platforms to provide real-time data and straight-through processing of trades. Custodial platforms include Schwab Advisor Services®, Fidelity Institutional Wealth Services®, TD Ameritrade Institutional®, Pershing Advisor Solutions®, Raymond James®, Merrill Lynch®, and more. Advisor Xi also works with Envestnet | Yodlee, ByAllAccounts® and Quovo® for bringing in held-away account information.

ADVISOR VIEW™

PORTFOLIO MANAGEMENT AND CLIENT ENGAGEMENT

Today, advisors want a complete picture of their entire book of business. The powerful reporting capabilities of Advisor View show the full view of your assets under management, so you can make the most informed decisions and meet the individual needs of each client.

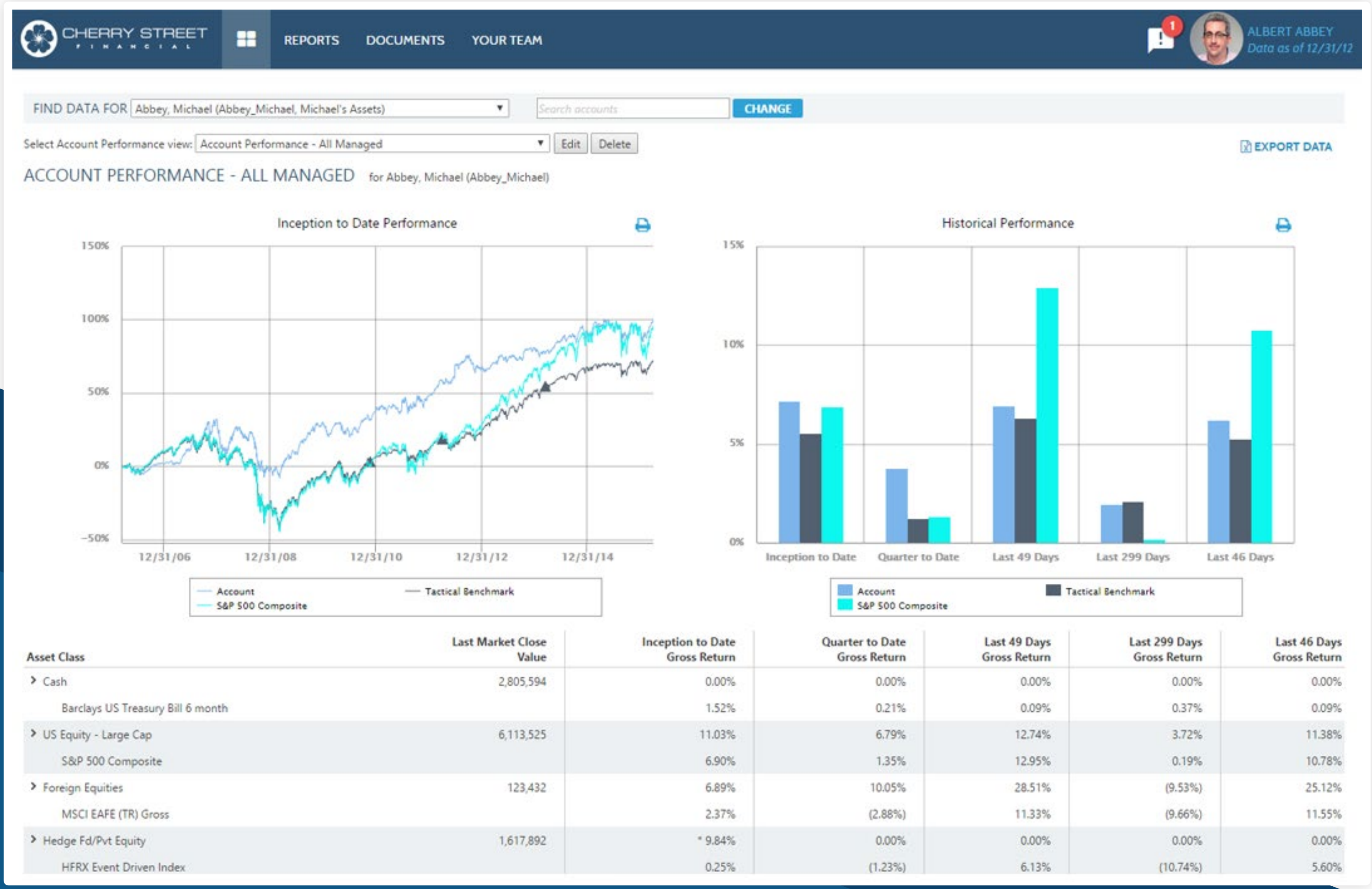
Advisor View delivers powerful portfolio analysis, flexible reporting, and extensive billing capabilities. It also produces professional client-facing PDF reports that you can customize at any time and share with your clients via the integrated client portal.

EMPOWERED STAFF

Advisor View provides actionable insights into your client portfolios. Each team member can define a custom reporting dashboard and view dynamic reports by advisor, household, firm, or any custom grouping that best supports how they service their clients. Easily edit and run dynamic reports and drill down to actionable account details. Advisor View also calculates daily intervals, giving you the flexibility to view information for any date range.

INDIVIDUALIZED PERFORMANCE REPORTS

No two investors are exactly alike. Advisor View helps you paint a complete financial picture for each of your clients and delivers it in a way that's easy to understand. The report designer puts you in control with a wide range of customization possibilities. Choose from the extensive library of included report templates and designs, select your report data, and add your own custom cover and header/footer graphics to support your firm's brand. Insert custom letters and other content that can be specific to each client using the included document assembly feature. Run PDF reports at any time and use the client portal to deliver them securely to your clients.



CLIENT ENGAGEMENT—REDEFINED

In today's digitally-driven world, it has never been more important to bring a lively and engaging online experience to your clients. At Tamarac, we understand that your client portal is an extension of your firm's brand and that investors at all investment levels are demanding more online tools to better manage their portfolios and interact with their financial advisors. The Advisor View client portal delivers a rewarding online experience for your clients, while communicating the value of your firm. Strengthen your firm's brand by adding your company logo and color palette to the portal, and make it accessible from your website with available single sign-on (SSO). The client portal provides your clients a single place to view their complete financial picture and interact with your firm.

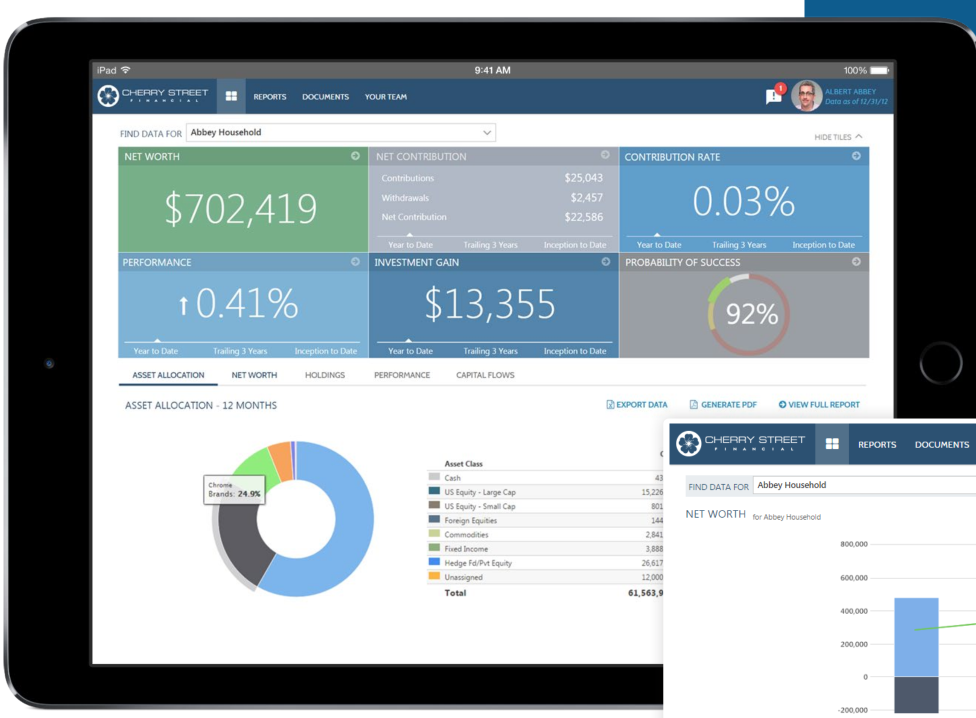
Advisor View's client portal gives your firm a competitive advantage so you can better engage your clients and capture the next generation of investors.

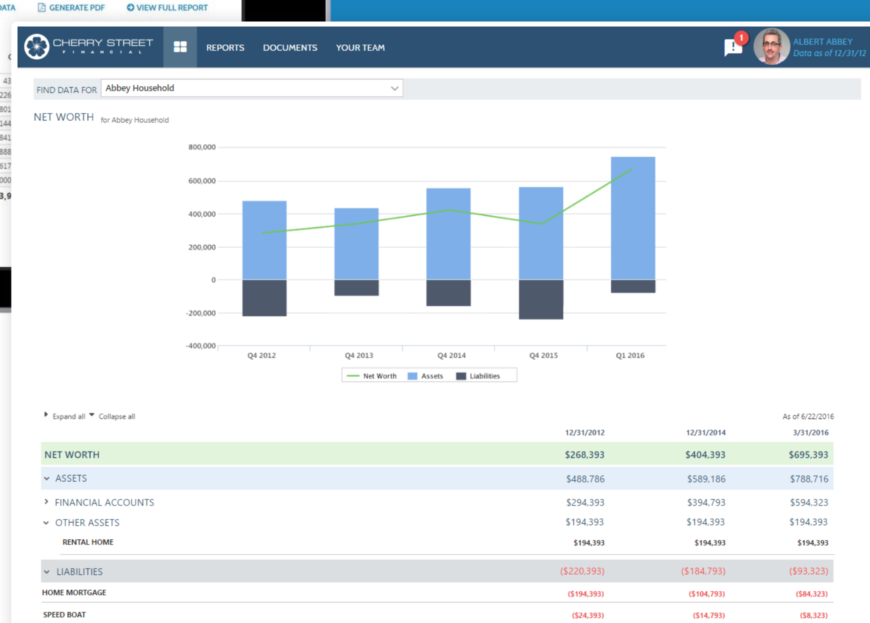
YOUR OWN IPAD APP

We'll create an iPad app that matches your firm's branding and upload it to the App Store® for you. Direct your clients to download your iPad app and deliver an engaging mobile experience that includes interactive performance reports, a document vault for PDF reports, videos, and other custom content from your firm.

TOP CLIENT ENGAGEMENT FEATURES INCLUDE:

- Goals-based reporting and access to financial planning tools from MoneyGuidePro®
- External account aggregation and manual asset/liability entry for net worth reporting
- Dynamic and interactive reports with zoom and animation
- Secure document vault to send, receive, and archive documents—including integrated eSignature and online form acceptance capabilities from DocuSign®
- Specific reports, dashboards, settings, and content can be applied to groups of clients, or you can define a custom experience for a specific household
- Display profiles, pictures, and contact information for your client's support team—automating how they interact with your firm





POWERFUL COMPOSITE REPORTING

Today, more and more investors are asking for transparency in performance reporting. That's why many firms are making their reporting practices compliant with Global Investment Performance Standards (GIPS). With Advisor View, you can create composites that follow GIPS standards. Create complex searches using integrated data from Advisor View and Advisor Rebalancing to identify accounts and automatically add them to a composite. Manually include or exclude accounts from a composite. Quickly and easily import your existing historical time series data that ties seamlessly with returns calculated by Advisor View.

RISK ANALYSIS

From risk analysis to portfolio analysis, Advisor View has you covered. Chart risk-adjusted comparisons to benchmarks and indexes for your client portfolios. Customize reports with relative statistics and portfolio metrics to better manage risk-adjusted returns. Report options include standard deviation, Sharpe ratio, alpha, beta, upside/downside capture, information ratio, and more.

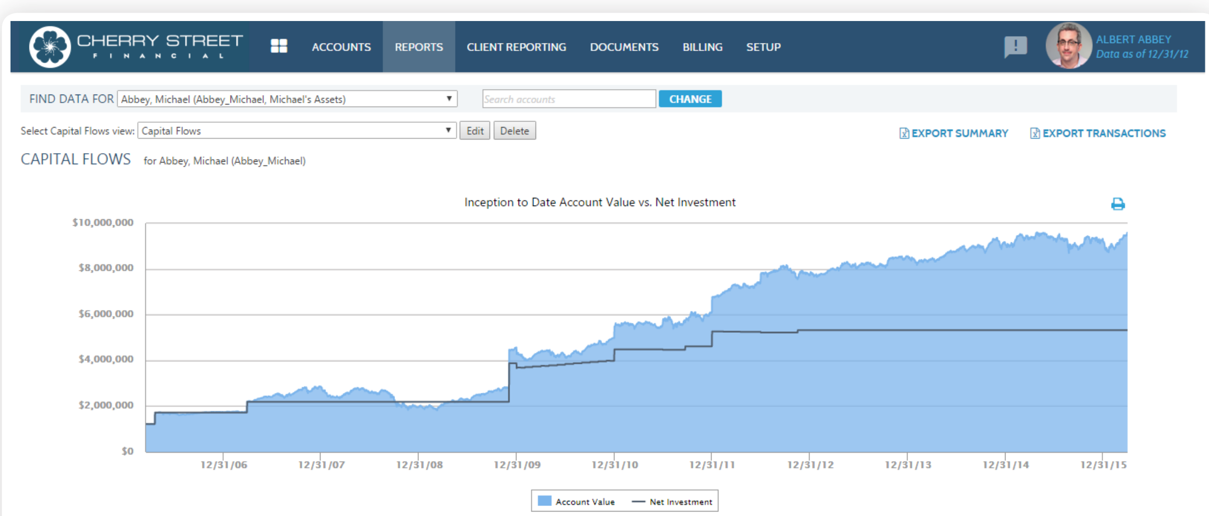
ALTERNATIVE INVESTMENT MONITORING

In today's complex markets, investors are more heavily exploring alternative investments such as private equity, limited partnerships, and real estate. As an advisor, it's important to track and accurately report this information to your clients so they can properly view all their investments in a consolidated report. You can create, maintain, and track alternative investments as IRR or TWR directly within Advisor View. Flag alternative investments as having committed capital structure and monitor call dates, call amounts, funding accounts, and the vintage year of the investment—and Advisor View will alert you to any upcoming capital call dates.

INTEGRATED AND ACCESSIBLE

Take advantage of the time savings that deep integration delivers. The full capabilities of Advisor View and Advisor Rebalancing are accessible directly from within Advisor CRM. Contextually link from a financial account or household into our integrated applications to service your clients. Leverage the powerful automated workflow capabilities of Advisor CRM to streamline the production of reports for your period-end reporting cycle.

Advisor View also integrates with a growing list of financial planning software vendors, account aggregation services, data analytics providers, custodial platforms, and Envestnet's managed investment products and research platform.



Inception to Date Summary

	Beginning Value	Contributions	Withdrawals	Net Contribution	Ending Value	Contribution Rate
2006 *	1,222,900.06	504,000.00	0.00	504,000.00	1,741,644.12	41.21%
2007	1,741,644.12	506,831.21	0.00	506,831.21	2,838,633.69	29.10%
2008	2,838,633.69	665,123.15	0.00	665,123.15	1,969,237.98	23.43%
2009	1,969,237.98	1,687,463.25	0.00	1,687,463.25	4,280,244.33	85.69%
2010	4,280,244.33	855,022.96	0.00	855,022.96	5,485,556.06	19.98%
2011	5,485,556.06	850,000.00	(16,100.00)	833,900.00	6,772,869.41	15.20%
2012	6,772,869.41	487,000.88	(26,000.00)	461,000.88	7,795,020.21	6.81%
2013	7,795,020.21	46,874.00	0.00	46,874.00	8,562,303.70	0.60%
2016 **	9,182,277.93	100,000.00	0.00	100,000.00	9,575,554.13	1.09%

FAMILY WEALTH REPORT AWARDS NEW YORK 2017
PORTFOLIO MANAGEMENT
WINNER
Envestnet | Tamarac

COMPLEX BILLING SCENARIO AUTOMATION

Advisor View streamlines your billing process and delivers an array of customizable billing options, so you can bill clients based on their preferences.

ON-DEMAND BILLING - Run billing statements during the billing cycle to recognize fees for new accounts, closed accounts, or projected revenue.

ONLINE STATEMENTS - Quickly post personalized billing statements to the client portal for online viewing.

RECONCILIATION - Manually or automatically reconcile payments for your services. You can mark payments as unpaid, paid, or partially paid and run reconciliation reports to track your outstanding fees.

AVERAGE DAILY BALANCE - Instead of using the beginning or ending market value of a security to determine the rate schedule to apply, Advisor View can use the average daily value of the portfolio to determine the appropriate fee.

UNLIMITED RATE TIERS - Create an unlimited number of rate tiers. Fees can be based on the value of the total portfolio, asset classes, sectors, subsectors, or security types.

MULTI-LEVEL CONTROL - Apply discounts at the account, billing definition, or billing group level.

FIRMS USING AN INTEGRATED TECHNOLOGY PLATFORM LIKE ADVISOR XI—ON AVERAGE—MANAGE TWICE THE ASSETS AND PRODUCE $100,000 MORE IN REVENUE COMPARED TO FIRMS WITH NO INTEGRATION.*

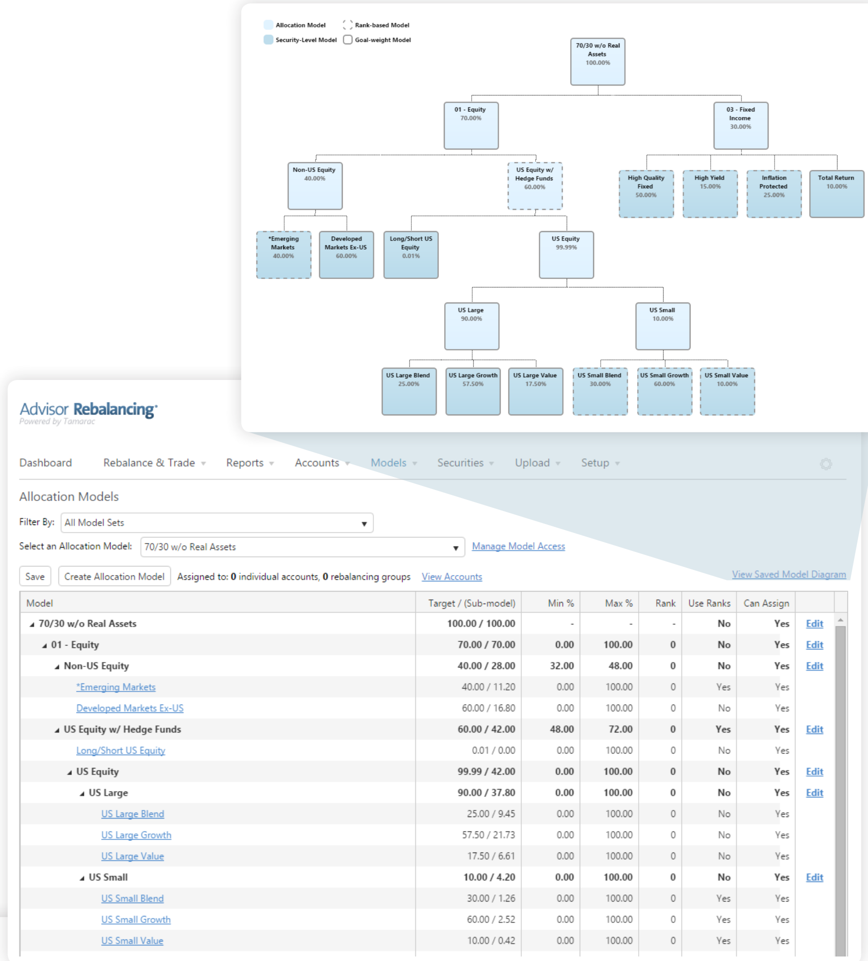
*AITE GROUP. (2013). RIA RODUCTIVITY AND PROFITABILITY: INTEGRATION PAYS.

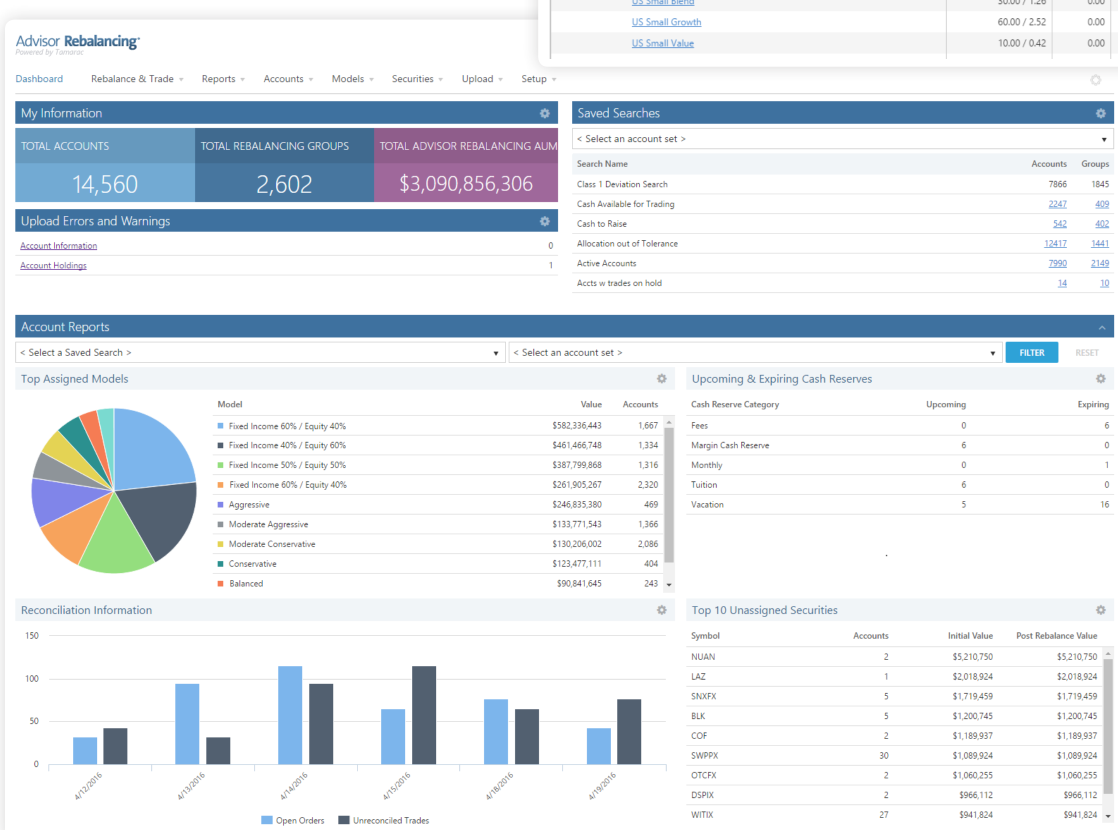
ADVISOR REBALANCING®

THE INDUSTRY'S LEADING PREMIUM TRADING APPLICATION

Efficient portfolio management begins with disciplined and flexible portfolio construction. Whether you're using a passive or active management strategy, Advisor Rebalancing dramatically abbreviates the trading process while adhering to your investment strategies, custom account settings, restrictions, and tax sensitivity.

Advisor Rebalancing delivers much more than portfolio rebalancing. Automate your model portfolio construction and management, monitor your accounts for trading triggers, make tactical trades, execute your trades directly with your broker, and reconcile trades from the previous day with the click of a button.





Wealth Management.com

2016 INDUSTRY AWARDS

WINNER | TECHNOLOGY PROVIDERS | REBALANCING

SOME TOP FEATURES OF ADVISOR REBALANCING INCLUDE:

MODEL PORTFOLIO CONSTRUCTION - Extensive modeling capabilities enable efficient management across thousands of investors with different goals, risk tolerances, and investment objectives.

DAILY PORTFOLIO MONITORING - Instantly look across all accounts and households for any custom criteria such as accounts that have drifted outside their target allocation, accounts that are holding too little cash, and accounts that are holding unrealized gains and losses.

CASH MANAGEMENT - Extensive cash management functionality and cash reserve tolerance bands make it easy to maintain proper cash reserves for each client's unique needs while adhering to the model, account restrictions, and tax sensitivity.

DIRECTED TRADES - Make tactical moves, focusing on individual securities, across one or many client accounts, outside the constraints of a model.

TAX MANAGEMENT AND TAX LOSS HARVESTING - Automate different loss harvesting strategies at the individual security level or across the entire account. Reinvestment of cash generated from harvesting activities is also automated so that the account can stay fully invested while taking the benefits of the tax loss harvesting opportunity.

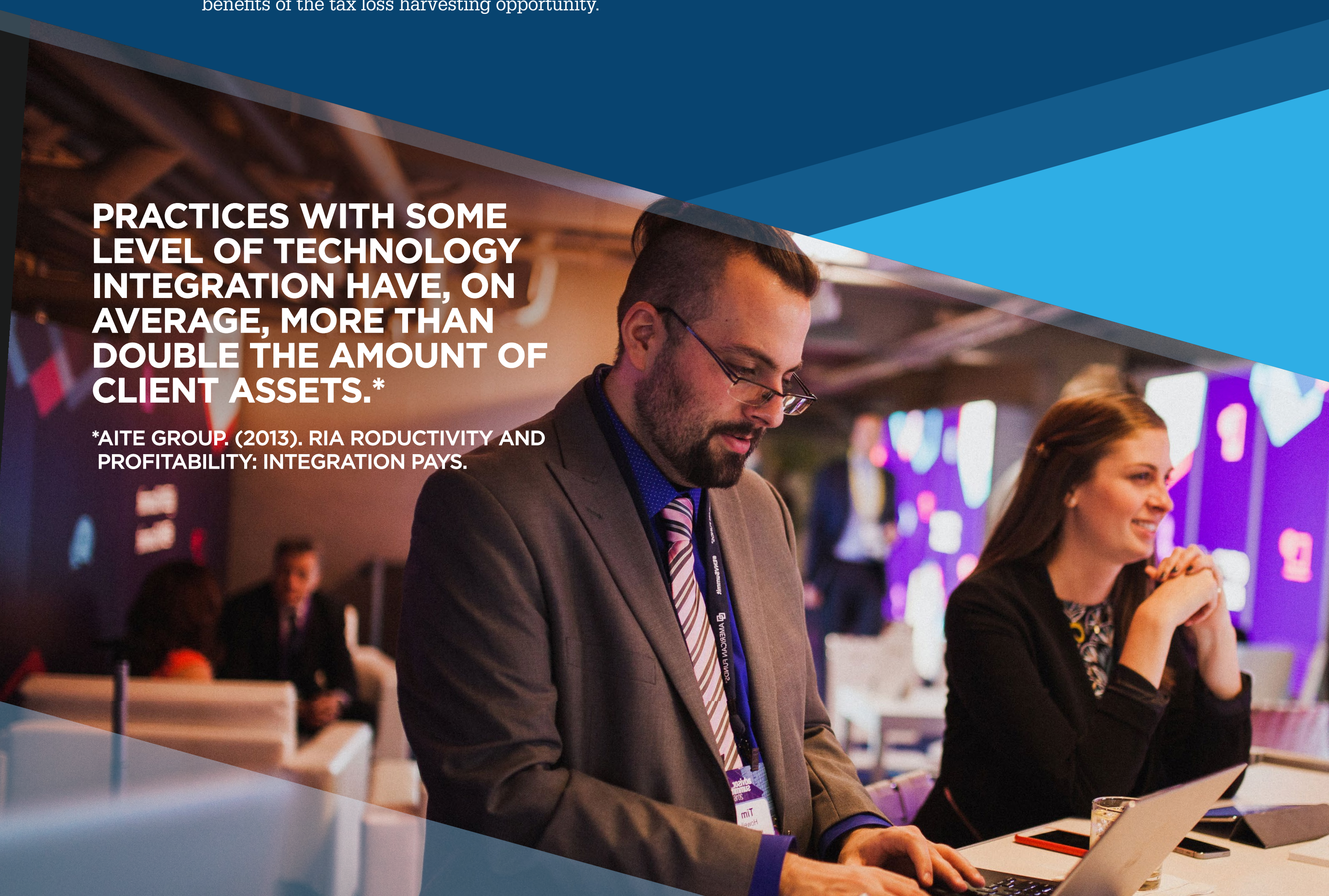
REBALANCING - Rebalance thousands of accounts and households in minutes. Take advantage of an "always on" rebalancing method and rebalance accounts as they meet your requirements.

REAL-TIME PRICING - Calculate trades with real-time pricing for U.S. equities and ETFs listed on U.S. stock exchanges, including NASDAQ, NYSE, NYSE Alternext, and over-the-counter exchanges.

TRADE RECONCILIATION - Automate the review process of logged trades against executed trades from your custodian with the click of a button, fulfilling your SEC-mandated obligation.

STRAIGHT-THROUGH PROCESSING - Execute mutual fund, ETF, and equity trades directly from Advisor Rebalancing. Streamline your trading workflows by routing and tracking trades from creation through settlement.

INTEGRATION AND ACCESSIBILITY - Handle your client request with greater efficiency using the integrations within the Advisor Xi suite. Contextually link into Advisor Rebalancing from Advisor CRM at the account or household level to process cash requests, rebalance accounts, manage cash settings, view account settings, and more.



PRACTICES WITH SOME LEVEL OF TECHNOLOGY INTEGRATION HAVE, ON AVERAGE, MORE THAN DOUBLE THE AMOUNT OF CLIENT ASSETS.*

*AITE GROUP. (2013). RIA RODUCTIVITY AND PROFITABILITY: INTEGRATION PAYS.

ADVISOR CRM®

CLIENT RELATIONSHIP MANAGEMENT FOR INVESTMENT ADVISORS

In a socially connected world, it has never been more important for advisors to deliver differentiated client experiences. Advisor CRM helps advisors do just that. With a user experience that is simple and intuitive, actionable intelligence at your fingertips, and an easy connection to people, Advisor CRM makes work personal by enabling your staff to provide a superior level of service.

Advisor CRM is a web-based client relationship management system designed specifically for independent advisors and built on the trusted Microsoft Dynamics® CRM 2016 platform.

Advisor CRM is designed to work with Microsoft Outlook®, and its interface is modeled after familiar Microsoft Office® applications—so your staff will have an easy time adopting it. Because it's built in the cloud, Advisor CRM can be accessed from anywhere via a computer or mobile device.

MEANINGFUL INTEGRATION

Take advantage of the time savings and operational efficiencies that an integrated platform delivers. Advisor CRM seamlessly integrates information and functionality from Advisor View, Advisor Rebalancing, and a growing list of third party applications.

From a client's financial account or household record in Advisor CRM, you can contextually link directly into Advisor View and access performance reporting functionality. For each client, you can access portfolio rebalancing settings and rebalance an account or household in Advisor Rebalancing with one click from Advisor CRM.

Eliminate duplicate data entry. Advisor CRM provides a single place to maintain shared data across multiple systems. Information entered in Advisor CRM is automatically updated in other applications that share the same data. For example, changing a client address in Advisor CRM will automatically update Advisor View—the portfolio management system—with the updated information.

POWERFUL BUSINESS INTELLIGENCE REPORTING

Gain deep insights with unique business intelligence reports. Because Advisor CRM is integrated with a wide range of data sources—including the portfolio management system, the client portal, custodial platforms, and Advisor Rebalancing—it can deliver key analytics without the need for manual intervention. As a result, Advisor CRM offers actionable business intelligence reports that automatically pull data from multiple integrated systems. Use business intelligence reports to track business development progress versus a target, prepare for client meetings, monitor your key centers of influence for referrals, and much more.

As a best practice, firms should track the worth of their business well in advance of succession planning—so that decisions can be made to boost the overall valuation of the business. To aid advisors in this process, we've created the Firm Valuation Profile report. The Firm Valuation Profile report shows you the top 10 metrics for determining the valuation of your business, such as the total number of clients, average client age, and average revenue. Advisor CRM then runs the metrics through extensive analysis to show you how your firm measures up in the areas Tamarac has identified for increasing business valuation.

CONFIGURED FOR YOUR BUSINESS

From business development to onboarding a new client, ongoing relationship and wealth management, and even account closing, Advisor CRM adds automation, transparency, and scalability to your daily operations.

Advisor CRM offers standard pre-packaged workflows that are modeled after the operational best practices Tamarac has learned from working with hundreds of advisory firms as we drive efficiencies through software automation. As part of the implementation process, Tamarac consultants work with your firm to configure workflows, reports, dashboards, and client filters to match how you run your business.

Microsoft® GOLD CERTIFIED Partner

Microsoft Dynamics® CRM Partner

Microsoft® Partner Network™

2016 PRESIDENT'S CLUB for Microsoft Dynamics

ADVISOR CRM ON THE GO

Mobile applications keep advisors connected to data, team members, and clients. With access to your CRM solution on your Windows® 8 tablet, iPad®, and mobile phone, you have the tools you need to deliver the best service possible.

Advisor CRM helps you stay connected and productive. Use your iPad or mobile device to stay up to date with your client information while you're on the go. Arrive prepared for every meeting, and update your notes, tasks, contacts, accounts, and leads while the details are still fresh in your mind.

SCALABLE

Built on the proven Microsoft Dynamics® platform, Advisor CRM will scale to meet the needs of any RIA. You will have peace of mind knowing that your CRM will support your firm's growth for generations.

SALESFORCE® INTEGRATION

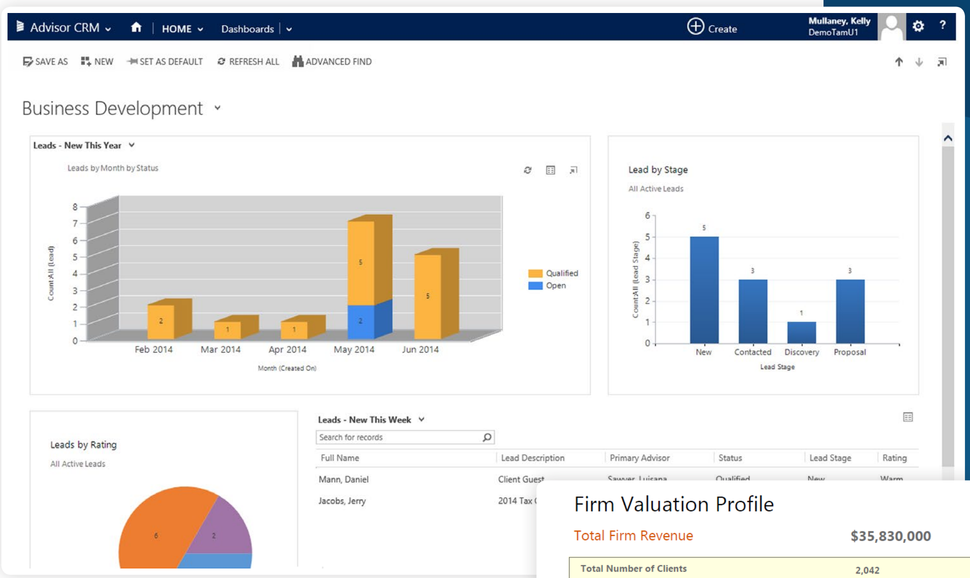
For firms using Salesforce, install the Tamarac app and integrate household, financial account and client information. Tamarac will also send event logs to Salesforce that track actions taken by your clients or advisors in our portal – such as logging in or posting a document. Additionally, use contextual links in Salesforce that direct you to client household and account information in Advisor View for taking quick action on client requests.

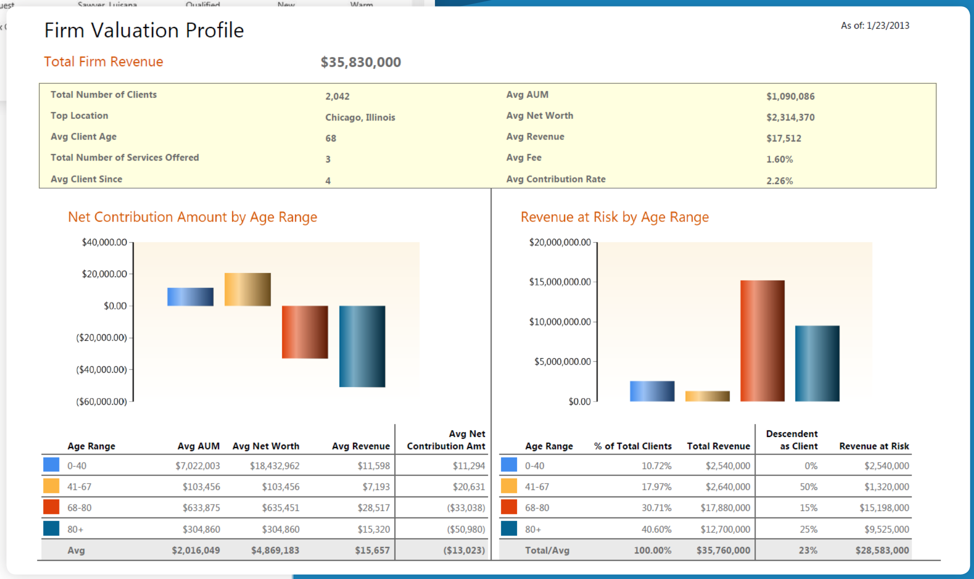
AUTOMATED WORKFLOWS

- New Client Onboarding
- Opening a Financial Account
- Closing a Financial Account
- Updating a Beneficiary
- Sending the Annual ADV & Privacy Policy
- Preparing for a Review Meeting
- Completing the Reporting Cycle
- Move Money
- Lead Pipelines
- Birthday Reminders

BUSINESS INTELLIGENCE REPORTS

- Firm Valuation
- All Activities
- Client Profile
- COI Profile
- Revenue vs. Target
- RMD Planning
- Tracking Business Development Leads





WE STARTED USING ADVISOR XI IN JANUARY OF 2010, AND HOPED THAT TAMARAC WOULD PROVIDE US WITH THE OPERATIONAL FRAMEWORK NECESSARY TO ACHIEVE PROFITABLE GROWTH AND SUPERIOR CLIENT SERVICE. WE STARTED SMALL BUT WANTED TO HAVE THE TOOLS AND PROCESSES NECESSARY TO BUILD AND GROW OUR FIRM AROUND SUPERIOR CLIENT SERVICE, EFFECTIVE WEALTH MANAGEMENT, AND COMPLIANCE OVERSIGHT. OUR BELIEF WAS THAT WE COULD DIFFERENTIATE OUR VALUE PROPOSITION BY USING SUPERIOR TECHNOLOGY LIKE TAMARAC TO DRIVE OUR GROWTH.

NEARLY THREE YEARS LATER, OUR FIRM HAS GROWN BY CLOSE TO 400 PERCENT. SURPRISINGLY, WE HAVE ONLY HAD TO INCREASE OUR STAFFING BY 20 PERCENT AS TAMARAC ADVISOR XI HAS ALLOWED US TO TAKE ADVANTAGE OF MANY ECONOMIES OF SCALE. BY USING AN INTEGRATED WEALTH MANAGEMENT SYSTEM, THE EFFICIENCIES OF OPERATIONS AND GROWTH HAVE BEEN REMARKABLE AND TRUE TO THE PROMISES MADE AT STARTUP.

STAN LOCHRIE, AIFA, PRESIDENT/CEO,
ETESIAN WEALTH ADVISORS INC.

ADVISOR SERVICES®

DAILY DATA AUDITS AND TRADE RECONCILIATION

Hand off your regular back office processes to Tamarac Advisor Services® and experience dramatic time and resource savings that can be reapplied to revenue-generating activities like building client relationships and bringing on more assets.

Your Tamarac Advisor Services team will download, post, and reconcile positions from your custodians and import your accounts, account holdings, and trade data into Advisor Xi—generally by market open.*

All reconciled data is integrated into the various Advisor Xi systems, so you can simply sign in and start working with the most current financial information. Run reports in Advisor View, monitor and trade accounts in Advisor Rebalancing, and access current account and household information in Advisor CRM—all while working with current and accurate data provided daily by Tamarac Advisor Services. With Advisor Services working to reconcile, update, and audit your data daily, your firm is always prepared for quarter-end or any other reporting period your firm defines.

** The timely posting of custodial data is contingent upon when Tamarac receives the files from the custodians.*

OUTSOURCED SERVICES INCLUDE:

- Daily position reconciliation
- Daily data audits
- Cost basis reconciliation
- Account aggregation
- Compliance reporting
- Billing and administration
- Daily system uploads
- Graphic design support for PDF report branding

STAFF AT FIRMS THAT BOAST SOME LEVEL OF INTEGRATION SPEND 32% LESS TIME ON OPERATIONS PROCESSES THAN THEIR PEERS, DESPITE HAVING SIMILAR TEAM SIZES.*

*AITE GROUP. (2013). RIA RODUCTIVITY AND PROFITABILITY: INTEGRATION PAYS.

BEST-IN-CLASS SUPPORT

IMPLEMENTATION, TRAINING, AND ONGOING SUPPORT

Tamarac customer support is the best in the business. Highly trained and professional, our support team won't be satisfied until your problem is solved or your question is answered. All of our customer support teams have strong backgrounds in finance and extensive training on all Tamarac products.

You can get answers to your questions by phone, e-mail, or online at our Support & Training Center. The Tamarac Support & Training Center combines our extensive Help Centers for each product with training from Tamarac University in an easy-to-use interface. Find answers to commonly asked questions, watch videos from our comprehensive library of training videos, search our online knowledge base, and more.

PROVEN IMPLEMENTATION PROCESS

Replacing manual processes with software automation represents a significant process change for any firm, and it offers opportunities for greater portfolio management efficiency by leveraging best practices learned from supporting thousands of advisors.

NEEDS ANALYSIS ▸ SETUP ▸ TRAINING ▸ ASSISTED USE ▸ TRANSITION TO SUPPORT

As a client of Tamarac, you will embark on a proven and streamlined implementation process with the support of a highly experienced team that works with you every step of the way. Our implementation team takes the time to fully understand your portfolio and client management process, guides you through setup, and offers best practices along the way.

TAMARAC UNIVERSITY

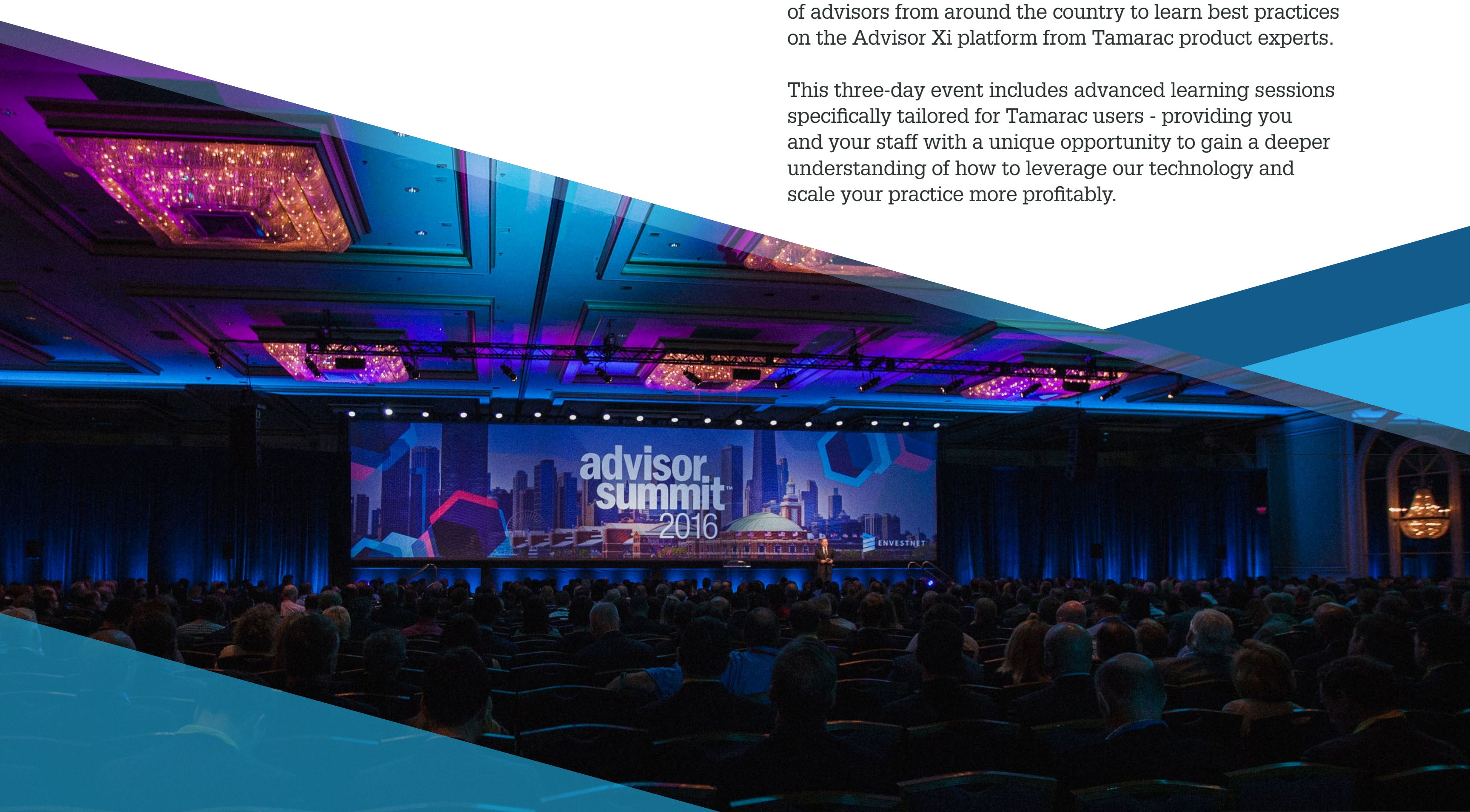
When it comes to training, we don't believe it's enough for our clients to simply know how to use our software. We understand the degree of change management that occurs when implementing new technology and we know that with change comes opportunities to follow the best practices of those who have gone before you. Whether it's increasing productivity, creating automated workflows, or designing a complex model, we want the process to be rewarding and meaningful.

Tamarac University occurs bi-monthly and trains your staff in our applications using your own data. At any time, your firm can send new and existing staff to any Tamarac University training. If you prefer to get up to speed on Tamarac products at your own pace, your staff can take advantage of the online training option. With online training, you gain access to all the same content and resources as those attending classroom sessions in person—complete with online quizzes, videos, and interactive activities. These online lessons are a great way for new users to get complete product training or for experienced users to refresh their knowledge of any part of the Advisor Xi system.

ADVISOR SUMMIT

The Advisor Summit is your opportunity to join hundreds of advisors from around the country to learn best practices on the Advisor Xi platform from Tamarac product experts.

This three-day event includes advanced learning sessions specifically tailored for Tamarac users - providing you and your staff with a unique opportunity to gain a deeper understanding of how to leverage our technology and scale your practice more profitably.



OPEN PLATFORM

BEST-IN-CLASS INTEGRATIONS MAINTAINED, ENHANCED, AND SUPPORTED BY TAMARAC

Tamarac Advisor Xi is an open platform with an available Application Programming Interface (API) for qualified third party vendors. A successful integration means streamlined data, enhanced capabilities, and—when done correctly—a more efficient business.

Integration between vendors is a two-way street. It takes dedicated resources from both parties to continually monitor, support, and enhance the integration as the various software components undergo their own innovation.

Tamarac is committed to selecting best-in-class integration partners and dedicating the appropriate resources to ensure that the integrations your firm chooses are functioning well and are continually being enhanced.

FINANCIAL PLANNING & ANALYTICS

INVESTMENT PRODUCTS & RESEARCH

DOCUMENT MANAGEMENT

ACCOUNT AGGREGATION

CRM

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14th Floor
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"SINCE 2008, OUR FIRM'S REVENUE PER EMPLOYEE HAS INCREASED BY OVER 70%. TAMARAC'S TECHNOLOGY SUITE HAS BEEN A KEY ENABLER FOR THIS DRAMATIC INCREASE IN EFFICIENCY, ALLOWING OUR TEAM TO FOCUS MORE ON HIGH-VALUE SERVICES FOR OUR CLIENTS. IN ADDITION TO IMPROVING CORE PROCESSES RELATED TO REBALANCING, REPORTING, AND BILLING, WE ALSO NO LONGER REQUIRE IN-HOUSE STAFF TIME AND EXPERTISE TO BUILD, MAINTAIN, AND UPDATE PROPRIETARY SOFTWARE FOR EACH OF THESE FUNCTIONS."

JOHN KIRKPATRICK, VICE PRESIDENT AND WEALTH ADVISOR
STANFORD INVESTMENT GROUP