

# Albridge Virtual Network

Financial services firms and investment professionals like you are always looking for ways to improve workflow and productivity. Whether you are in the front or back office, you can leverage your preferred technology and integrate applications with a single source of data.

## Key Benefits

Albridge, an interoperability leader, has preferred partnerships with more than 50 technology applications.

- Automatic application and data sharing with Virtual Network partners.
- Complete enterprise data set delivered daily.
- Customized batch files to enhance information in proprietary and third-party applications.
- Preferred applications include compliance, investment analytics and proposal tools, financial planning and research and analytics.

The **Albridge Virtual Network** is a suite of solutions to facilitate data integration and application interconnectivity for Albridge applications, its numerous third-party relationships and your proprietary applications. The Albridge Virtual Network provides a complete, secure, reliable and customized platform that integrates your experience and consolidated data to create a seamless workflow environment.

## A Virtual Portal of Preferred Technologies

Providing the framework for financial services firms to develop a true all-inclusive workstation, the Albridge Virtual Network integrates critical technologies and outsourcing components. Firms may incorporate one holistic dataset into all their mission-critical applications. By maximizing the use of client account data, the Albridge Virtual Network helps you increase business efficiency and improve productivity.

## Deep Integration With Over 50 Technology Applications

Firms benefit from the many strong relationships that Albridge has forged with leading technology providers in the financial services industry. Third-party applications address a range of needs from compliance to financial planning—all deeply integrated with the Albridge application.

## Albridge Virtual Network Relationships

### Financial and Estate Planning:

- > **AdviceAmerica:** AdvisorVision
- > **Advisory World:** ICE
- > **Aralia:** Estate Planning Network
- > **Cheshire Software:** Wealth Manager
- > **EISI:** NaviPlan and Profiles
- > **eMoney:** Advisor Platform
- > **Finance Logix:** Advisor and Client Portal
- > **LifeYield:** Unified Managed Household & Retirement Income Technology
- > **Lumen Systems:** Financial Planning Professional
- > **MasterPlan Financial Software:** MasterPlan
- > **Money Tree Software:** TOTAL Planning System
- > **PIE Technologies:** MoneyGuidePro
- > **Sungard:** PlanningStation/ AllocationMaster



## Albridge Virtual Network Solutions

- **Albridge's Applink** provides interconnectivity, application sharing and data transfer capabilities with a single log on. Combined with the Albridge Wealth Reporting™ platform, financial services firms gain the framework needed to develop a truly all-inclusive financial services workstation.
- **Albridge's Replicated Data** service delivers a secure, reliable and cost effective solution for consolidating, normalizing, cleansing and storing transaction and position information from multiple back-office and legacy systems through the delivery of nightly batch files.
- **Albridge's File Delivery** service supports firms and their relationships with customized batch files used in third-party or proprietary applications.
- **Albridge Data Aggregation** brings clients' held-away assets into the Albridge Wealth Reporting application to give you a more complete picture of their clients' assets and vastly expand their data source landscape to nearly 10,000 financial websites.
- **Wealth Desktop**, powered by Lipper and Zack's Investment Research data, has research and analytics tools to easily develop and share investment analyses and proposals with clients and prospects.
- **Albridge Market Information** powered by Interactive Data enables firms to view market data, news and intelligence gathering tools directly from Albridge Wealth Reporting.

### Research and Analytics:

- > **BlackRock:** BlackRock Advisor Site, Fund Information
- > **Eaton Vance:** Eaton Vance Products, Fund Information
- > **Gravity Investments:** G-Sphere, Portfolio Diversification and Optimization
- > **Interactive Data:** Albridge Market Information
- > **Morningstar®:** Advisor Workstation Enterprise and Office Edition
- > **Ordex Systems:** WealthMax
- > **Prudential:** Prudential Funds Professional Site, Fund Information
- > **Wall Street on Demand:** Wealth Desktop

### Client/Business Relationship Management:

- > **Allied Financial:** Act4Advisors
- > **Advisor Products Inc.:** AdvisorSites
- > **AppCrown:** CRM
- > **Big Contacts:** Big Contacts for Financial Professionals
- > **Capital Rock:** RightBridge
- > **Client Marketing Systems, Inc.:** Advisors Assistant
- > **CRM Software:** Junxure I
- > **Ebix CRM:** SmartOffice
- > **Pareto Platform:** Business Development Relationship Management
- > **ProTracker:** ProTracker Advantage
- > **Redtail Technology:** Our Business Online
- > **Smarsh:** smarshCRM
- > **Upswing:** Upswing CRM for Investment Professionals

### Automated Forms Relationships:

- > **Efficient Technology, Inc.:** Quik! Forms Library
- > **LaserApp:** LaserApp

### Data Aggregation and Compliance:

- > **American Outsourcing:** STARS
- > **CashEdge:** All Data Platform – Data Aggregation
- > **NICE Actimize:** Actimize Brokerage Compliance

### For More Information

To learn more about the Albridge Virtual Network, call (877) 252-9963 or e-mail [virtualnetwork@albridge.com](mailto:virtualnetwork@albridge.com).

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