

# Dispelling the Myths: Albridge Wealth Reporting



- Broker-Dealer
- RIA
- Hybrid Firm



Pricing that  
makes sense



Portability



Tell the  
whole story

*Myth: Only broker-dealers can use Albridge Wealth Reporting*

**Truth: Everyone can leverage Albridge Wealth Reporting**

Good news: if you've traditionally accessed Albridge Wealth Reporting through your broker-dealer, and are considering changing broker-dealers or following an RIA route you can still use the Albridge Wealth Reporting solution that you have come to rely on. Albridge is available on most RIA custodial platforms, and we have pricing available at an individual advisor level.

*Myth: Albridge Wealth Reporting is out of budget.*

**Truth: Albridge Wealth Reporting is cost effective and easy to get up and running.**

Many people dismiss Albridge Wealth Reporting as too expensive. We have undergone a careful review of pricing; for a very reasonable fee you can access complete data aggregation, performance reporting, various benchmarks, and account values over multiple time periods. Albridge Wealth Reporting offers the ability to be far more efficient, and to deliver a better client experience through clear, understandable charts and graphs that can be the foundation for every client meeting.

*Myth: Changing broker-dealers means you lose your client's information.*

**Truth: You can take your data wherever you go.**

When illustrating how a certain portfolio has performed for a long-time client, it's important to be able to access historical information, and Albridge Wealth Reporting offers that ability. If you change firms but remain an Albridge client, your client information moves with you,<sup>1</sup> giving you the ability to clearly demonstrate your value as an advisor, over time. And—with a user-friendly interface available on tablets or laptops, the definition of “data portability” also extends to accessing client information wherever you meet clients—at their office, on the road, or wherever they have a question.

*Myth: You can only have visibility into those client assets you manage.*

**Truth: Complete data aggregation helps you provide more comprehensive advice.**

Through integrations with Morningstar's ByAllAccounts and FiServ's CashEdge, Albridge is able to provide comprehensive data aggregation and include information on assets and liabilities such as bank accounts, credit cards, 401(k)s, so that you are able to provide the holistic advice that is especially important to high-net-worth clients.

<sup>1</sup> With consent to such historical data by the former broker-dealer.

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## For more information

To see for yourself how Albridge Wealth Reporting gives you the whole picture, contact your financial organization.

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