

WealthTechs Launches Financial Account Data Technology Platform at 2016 T3 Advisor Conference

San Diego-based firm provides the advisor industry with technology to reconcile faster and save 50% on data costs

2016 T3 Advisor Conference, Ft. Lauderdale, FL. – WealthTechs, a leading data technology platform, announced February 8 that the company has officially concluded its first round of client implementations and is in production at 50 independent advisory firms, managing over \$100 billion in assets.

“Advisors are experiencing cost and quality concerns in their back offices and need alternative financial account data solutions to better manage client portfolios,” said Chris Casey, CEO of WealthTechs. “Our team has decades of portfolio accounting and custodian financial account data technology experience, which has enabled us to build solutions that instantly increase our clients bottom line profit margins.”

WealthTechs provides advanced technology to aggregate, standardize and integrate financial account data from the world’s leading custodian banks with the industry’s leading investment systems for Advisors, FinTech companies and Back Office Outsourcing firms.

“We were extremely impressed with WealthTechs’ capabilities, costs and high quality data.” said TJ Jones, Chief Technology Officer for Gamble Jones Investment Counsel, a \$1.2 billion investment advisory firm in Pasadena, CA.

WealthTechs seamlessly integrated client financial account data from Charles Schwab, TD Ameritrade and Fidelity with Gamble Jones’ Advent APX portfolio accounting system. “We were able to cut our custodian data costs by more than 50% with WealthTechs and reduce our reconciliation time,” Jones said.

WealthTechs will be officially launching its industry leading technology at the upcoming Technology Tools for Today (T3) conference, to be held February 9-12, 2016 in Ft. Lauderdale, Florida. WealthTechs CEO Chris Casey will also be a featured speaker in a special break out session, to be held on the morning of February 12, 2016.

About WealthTechs

WealthTechs Inc. is a leading data technology firm, founded by Chris Casey, a veteran financial services technology executive. WealthTechs provides technology to aggregate, standardize and integrate financial account data with the world’s leading investment systems for Advisors, FinTech Companies and Back Office Outsourcing Firms. The WealthTechs team brings together industry experience from the most established companies in the industry including SS&C, Advent Software, Satuit Technologies, Factset, and Broadridge. WealthTechs is rapidly growing due to high demand for its high quality, integrated financial account data solutions. WealthTechs is headquartered in Oceanside, California with offices in Denver, New York City, Salt Lake City, San Francisco and Argentina.

WealthTechs currently offers custodian data solutions for leading custodian banks, such as: Interactive Brokers, Charles Schwab, Fidelity, TD Ameritrade, Pershing, Raymond James, State Street Bank, Wells Fargo First Clearing and over 30 others. WealthTechs also provides seamless integration to the following investment systems: Advent APX, Advent Axys, Schwab Portfolio Center, WealthSite and Private Wealth Systems.

For more information about WealthTechs, visit www.wealthtechs.com or call (760) 231-5771