WealthTechs To Sponsor “Best New Solutions” Panel at the 2017 AUG Boston Member Meeting at The Seaport Hotel

San Diego-based firm provides the AUG community with custodian data technology to reconcile faster and save 50% on data costs

2017 AUG Boston Member Meeting. **February 23, 2017, Boston, Massachusetts** – WealthTechs, a leading custodian data technology provider for advisors using the Advent and other portfolio accounting systems will sponsor a panel focusing on the “Best New Solutions” at the 2017 AUG Boston Member Meeting at The Seaport Hotel.

“Boston is the investment advice capital of the world. There is a huge base of over 1,300 advisor firms in Boston that have a need for lower cost, higher quality custodian data to stay competitive and profitable. WealthTechs currently has two large customers in Boston that have been a great success and we are looking forward to helping other advisors as well. WealthTechs is very proud to have the opportunity to sponsor the 2017 AUG Boston Member Meeting and a panel on Best New Solutions” said Chris Casey, CEO of WealthTechs. “We can’t wait to get together face to face with our Boston based customers and AUG members and talk about our custodian data solution that helps Advent and other portfolio accounting system users download and reconcile faster.”

WealthTechs provides Advisors with advanced technology to aggregate, standardize and integrate financial account data from the world’s leading custodian banks with Advent Axys, APX, Geneva and other leading portfolio accounting systems.

“We thank WealthTechs for sponsoring our 2017 Boston AUG-The Exchange Member Meeting.” said Jennifer Litchfield, Executive Director, AUG-The Exchange.

About WealthTechs

WealthTechs Inc. is a leading data technology firm, founded by Chris Casey, a veteran financial services technology executive. WealthTechs provides advisors with advanced technology to aggregate, standardize and integrate financial account data from the world’s leading custodian banks with the Advent Axys, APX, Geneva and other leading portfolio accounting systems. 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 custodian financial account data solutions. WealthTechs is headquartered in San Diego, California with offices in 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, Advent Geneva, Schwab Portfolio Center, WealthSite and Private Wealth Systems.

For more information about WealthTechs, visit www.wealthtechs.com or call (760) 230-1575

About AUG-The Exchange

AUG-The Exchange is the largest person-to-person networking resource group for the wealth and investment management industry. Founded in 1998, AUG is the result of a strong group of investment industry professionals with a desire to bring people together in an independent forum to connect, collaborate and share solutions. Today, AUG remains committed to leveraging its collective voice with industry vendors while fostering a spirit of collaboration within the investment management community. The AUG creates a unique network which offers a forum for interactions on industry-related topics, opportunities to collaborate on tips, tricks, and industry best practices, and channels feedback to industry service providers.

For more information about AUG, visit AUGtheexchange.org or call (888) 241-6881.