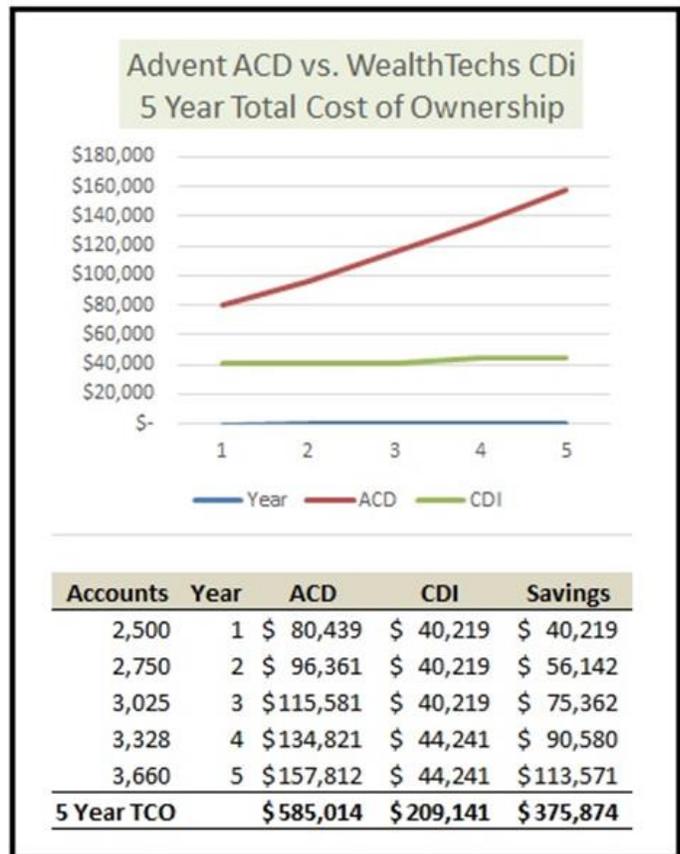


# WealthTechs 5-Year TCO Analysis For 2500 Accounts Versus Advent ACD Saves 64.3% and \$375,874

**March 20, 2017, Encinitas, California** – WealthTechs, a leading custodian data technology provider for advisors using the Advent and other portfolio accounting systems published a financial case study on LinkedIn and Twitter showing the 5 Year TCO versus Advent ACD and the savings were astonishing with WealthTechs.

“We conducted this study using data gathered from Advent users over the last year. The amount of money we can save an advisor is overwhelmingly positive news for WealthTechs. It is not often you can swap out one system for another and save 64.3%! The wildcard in this equation is there is no published ACD price list and we find that some advisors pay very different rates for the exact same custodian data feeds on ACD” said Chris Casey, CEO of WealthTechs. “This makes our ability to publish our prices very difficult. Any way you look at it, we commit to lowering the cost of custodian data fees by 50% or more and we are delivering exactly that. Our long-term goal is further drive costs even lower as we gain economies of scale. The custodian data world we want our customers to live in is utopian: low cost, high quality, great service. We want active managers to be able to compete against robo-advisors and index funds on fees, and custodian data fees are decent sized slice of the pie.”



## About WealthTechs

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. 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.

For more information about WealthTechs, visit [www.wealthtechs.com](http://www.wealthtechs.com) or call (435) 631-0423

