

WealthTechs CEO Chris Casey to Moderate AUG Online Webinar Panel Discussion On Custodian Data Technology For Advisors

Rapidly growing San Diego County based FinTech firm provides advisors using SS&C Advent portfolio accounting systems with 50% cost savings on their custodian bank customer data aggregation and technology.

November 16, 2016, Encinitas, California – WealthTechs, a leading custodian data technology provider for advisors using the Advent & and other portfolio accounting systems has been chosen to moderate a panel of members for the largest member only community of investment advisors AUG o be held at The Princeton Club of New York on October 28, 2016.

“New York based advisors are the most respected, fast-paced and innovative in the world. WealthTechs is very proud to have the opportunity to sponsor the 2016 AUG New York Member Meeting,” said Chris Casey, CEO of WealthTechs. “Me and other members of the WealthTechs team call New York our home. We know how New Yorkers think; we’ve spent the time in the trenches downloading and reconciling in New York; we know the pressure. We can’t wait to get together face to face with AUG members and talk about our custodian data solution that helps Advent & portfolio accounting system users download and reconcile systems faster.”

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.

“We thank WealthTechs for sponsoring our 2016 New York City AUG-The Exchange Member Meeting.” said Jennifer Litchfield, Executive Director For AUG-The Exchange, in Columbia, SC.

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 and Broadridge. WealthTechs is headquartered in Encinitas, 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 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.