



Custodian Data Interfaces As Of 3/2/17

Aberdeen	Kingdom Trust
Amalgamated Bank of Chicago	Kovack Securities
Apex Clearing	Merrill Lynch
Arrowstreet	Merrill Lynch UMA
Bank Of America/US Trust	Morgan Stanley Smith Barney
BONY Mellon PWC	Morgan Stanley UMA
Bank of The West	National Bank of Canada Correspondent
BF Edwards	Northern Trust Corporation
BMO Harris	Pembroke
Boston Company	Pershing IMS
Citibank	The Private Bank
Citizens Bank	Raymond James
Comerica Bank-California	RBC Global
Comgest	Santa Barbara Bank
Commerce Bank	Schwab Institutional
DST Systems, Inc.	Schwab Trust Company
Envestnet	SEIC
Etrade	Southside Bank
Fidelity	State Street Corporation
Fidelity Management Trust	Stifel Nicolaus
Fiduciary Trust Company	Suntrust
Fiduciary Trust International	TD Ameritrade
First Clearing	TD Wealth
First State Trust	TradeStation
FolioFN	Transamerica
Goldman Sachs	UBS
Huntington National	UBS SWP
Interactive Brokers	Union Bank Of California
JA Glynn	US Bank
Jefferson National	Van Berkom
JP Morgan	Vontobel
Key Bank	Wells Fargo

For More Information, Contact Chris Casey, CEO  
435-631-0423  
[chris@wealthtechs.com](mailto:chris@wealthtechs.com)