

WealthTechs Collaborates with Cascade Compliance to Automate GIPS Verification

Two Advisor Focused Firms Think Out Of The Box To Reduce Costs Of GIPS Certification

WealthTechs Collaborates with Cascade Compliance to Automate GIPS Verification. April 24, 2018, Park City, Utah - WealthTechs, a leading custodian data technology provider for advisors using SS&C Advent and other portfolio accounting systems, today announced that it will be collaborating with a new GIPS verification firm Cascade Compliance and there may be some benefits to WealthTechs customers.

“The owner of Cascade Compliance, Kim Cash, and I have known each other for years and I respect her as one of the foremost authorities on GIPS. Kim was a very early Ashland auditor and held a senior role in the firm. Kim and I think there may be a way to leverage WealthTechs custodian data to streamline the testing of GIPS verification data. We don’t know whether this is true or not, but we want to find out. Me and the WealthTechs team are willing to invest time and development effort at no cost to our customers to make this work. Kim at Cascade is offering a big discount on her services to WealthTechs customers in exchange for helping us prove this concept. Even if this does not work, worst case scenario is you save a ton of money on your GIPS Verification by one of the best in industry,” said Chris Casey, CEO, WealthTechs.

About WealthTechs

WealthTechs Inc. is a leading data technology firm serving the larger institutional and high & ultra-high net worth advisor industry. WealthTechs provides advisors with advanced technology to aggregate, normalize 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 Carlsbad, California, with offices in, Park City, Utah, New York City, Boston and Argentina.

WealthTechs currently offers custodian data solutions for leading custodian banks, such as: Interactive Brokers, Charles Schwab, TD Ameritrade, Pershing, Raymond James, State Street Bank, Wells Fargo First Clearing and over 80 others. WealthTechs also provides seamless integration to the following investment systems: Advent APX, Advent Axys, Advent Geneva, Schwab Portfolio Center, AssetBook, Finfoolio, WealthSite and assists customers with custom data integration projects as well.

About Cascade Compliance

Cascade Investment Compliance & Verification, LLC provides focused expertise to help managers and asset owners achieve and maintain independently verified compliance with the Global Investment

Performance Standards® (GIPS®). Cascade Compliance brings together a collaborative, accessible network of knowledgeable professionals with decades of audit and industry experience. Cascade can answer the tough questions with insight from first-hand experience. Cascade focuses on advisors' needs whether your firm is considering implementation of a GIPS compliance project, the impact of a merger or acquisition on the portability of a performance record, or how to improve your current practices for maintaining robust performance policies and procedures.

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