

Reporting

Custodian Statements & Websites

Your custodian provides official statements and record keeping services for your accounts. You can also access your custodian directly online.



Consolidated Performance Reporting

Our web-based portals, powered by Tamarac and eMoney, provide clients with daily online access to their account information, across multiple custodians.



Our Portals Include the Following Features:

ACCOUNT AGGREGATION

FLEXIBLE DATA VIEWS

MULTIPLE ASSET ALLOCATION VIEWS

PERFORMANCE TRACKING

CUSTOMIZED REPORTS

DRILL DOWN TO ASSET LEVEL PERFORMANCE

GAIN/LOSS & DIVIDEND/INTEREST REPORTING

PRIVATELY HELD, ILLIQUID ASSET ENTRY & TRACKING

SECURE ONLINE DOCUMENT VAULT



Let's Chat

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