Apex API's allow our correspondents to integrate with our back office processes in the most efficient and streamlined method possible. Our web services maximize automation to minimize the time it takes our client to provide account management to their customers. Apex API's provide the backbone of a scalable and transparent platform that offers the fastest and simplest user experience.

Account Management Service (Atlas)

- Facilitates electronic account opening with inline CIP and KYC checks in under 20 seconds
- Allows clients to immediately remedy failed CIP/KYC tests via user interface or API call
- Supports e-signature and paperless account signup.
- Allows clients to retrieve information for a given account number, including name, address and status to easily update accounts.

Cash Management Suite (Sentinel)

- Facilitates inbound and outbound money movement via ACH, debit card, wire transfer and check.
- Allows customers to create, view, update and cancel ACH, wire transfer, and cash journal transactions.
- Facilitates instant account verification of customer bank accounts upon ACH relationship creation
- Includes a sophisticated risk assessment framework that analyzes all incoming and outgoing cash transfers.

Apex Log Events (ALE)

- Provides correspondents with real-time updates of back office events, including notifications when an account has been opened, when a wire has cleared and funds are available in account, when an ACH transfer has been initiated, or when an account has been transferred from another firm.

ACAT Service (ALPS)

- Facilitates in/out ACAT processing from customers to the DTC
- Automatically accepts or rejects 95% of requests without manual intervention
- Enables customers to initiate ACAT transfers and receive detailed updates of state changes throughout the transfer.
- Offers correspondents the ability to query details of a transfer and reject it based on their business rules

E-Delivery

- Provides customers with access to electronic documents, including confirms, statements, tax, proxy and prospectus information.
- Offers customers the ability to update email addresses associated with a given user. This email address is used to notify customers when e-documents are available for retrieval from Apex's secure mail website or web service.
- Allows correspondents to white-label and customize statements and confirms