Bridge*Portfolio*®

Cure your back office blues.®

Account Opening Solution

When you have the back office blues, Bridge*Portfolio*® has the solutions that will cure your blues and help you build your ideal business. Focus on what you do best and leave the back office functions – account opening, trade modeling, reporting, fee reporting and more – to Bridge*Portfolio*.

Bridge*Portfolio* Takes the Blues Out of Account Opening

Opening client accounts has traditionally been time-intensive and repetitive. Do you feel as if you have to ask your clients the same questions over and over? Do you feel that you are constantly inputting the same information over and over and over?

Bridge*Portfolio*'s Account Opening solution will save both your clients' time and yours.
That's because:

- **Bridge*Portfolio*'s Account Opening solution is online.** Visit your private-labeled website and use our online tools to open and support any type of client account at a variety of custodians.
- **You only need to gather information once.** Subsequent forms are auto-populated from information already captured online.
- **You can interface with multiple contact management systems.** Bridge*Portfolio* gives you the ability to interface with multiple systems – like Redtail and Juncture – to create a seamless interface between the account opening tool and your contact management system.

How Bridge*Portfolio* Makes Account Opening Easier

Bridge*Portfolio* puts the tools you need in your hands so that you can open accounts and fulfill other client needs quickly and accurately in one, streamlined process. Using this solution lets you:

- **Store account information so that it's at your fingertips.** You can use stored client data for opening any type of new accounts and transferring accounts without taking up storage space on your server. The forms and data you need come together automatically using Bridge*Portfolio*'s solution.
- **Assist your clients immediately.** The Bridge*Portfolio* Account Opening solution includes advisor agreements, such as your investment policy and asset allocation strategy, online. You can provide them to your clients immediately instead of following-up later.
- **Complete a risk questionnaire online.** As you complete the account opening process, you'll need to know your clients' comfort levels with regard to risk. This online questionnaire will help you assess clients' risk tolerances so that you can better strategize portfolios to meet clients' goals.

The Cure Is a Call Away

Call Bridge*Portfolio* today. Using Bridge*Portfolio*'s Account Opening solution will help you focus on what you do best. Ask us about our other services – ranging from portfolio accounting and trade modeling to fee reporting and comprehensive account solutions – that will cure your back office blues while building your ideal business.

Marketing@Bridge*Portfolio*.com | 1 (800) 610-8882 | www.Bridge*Portfolio*.com
411 North LaSalle, Suite 400, Chicago, IL 60654