

# Providing state of the art technology and custodial services exclusively to RIAs

We are TradePMR. We provide RIA-focused technology and white-glove custodial services to advisory firms across the country. We focus on empowering RIAs to more efficiently manage their client relationships, streamline their operations, and help grow their business.



# Hear it straight from our RIAs



“

**It didn't make sense for us to sit and wait for the right time – there will always be reasons to hold off, but we felt the benefits of switching were too significant to ignore.”**

**Marc Horner,  
Fairhaven Wealth Management**

TradePMR and Fairhaven Wealth Management are not affiliates. Securities offered through TradePMR. Mr. Horner received no compensation for his endorsement of TradePMR.



“

**The [TradePMR] team is so nimble when it comes to service, they're proactive, they pay attention, and that makes a big difference.”**

**Brian Bischoff,  
Bischoff Wealth Management**

TradePMR and Bischoff Wealth Management Group are not affiliates. Securities are offered through TradePMR. Mr. Bischoff received no compensation for his endorsement of TradePMR.



“

**Since we've partnered with TradePMR, they've listened to us, they've been responsive, and provided a high-level of personalized service for our team.”**

**Christopher W. Brown,  
Brown Miller Wealth Management**

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# By an RIA for RIAs

TradePMR's Founder and CEO Robb Baldwin was a successful RIA (like yourself) but realized after a difficult custodial merger that most advisors weren't getting the support they needed. Robb built TradePMR to offer powerful technology designed to meet RIAs' unique needs and give them the attention they deserve.

## ➤ **Built by an RIA for RIAs**

We believe in providing a custodial service that understands your business and supports your success like it's our own.

## ➤ **It Starts with You**

We provide white-glove support to our clients to help you grow your business.

## ➤ **We Treat RIAs like VIPs**

At TradePMR, our philosophy is simple. Provide the best customer service and technology to help your business thrive.

## ➤ **Powerful Technology**

Our Fusion platform offers tech solutions specifically designed to meet the unique needs of independent RIAs.

## ➤ **Innovative & Intuitive**

We improve existing technology and develop new technology to provide state-of-the-art products and services to advisors.

## ➤ **Seamless Transitions**

From day one, our team of specialists serves as your single point of contact to guide you through the process of learning a new platform, onboarding new clients and much more.

## ➤ **Serving Your Team, 100% of the Time**

With no retail channel, the TradePMR team is fully committed to serving your unique business, not competing with you for clients.

# Advocates for Your RIA

## Rated #1 by Your Peers<sup>2</sup>

Advisors work hard to earn your clients' trust. At TradePMR, we understand the nuances of those relationships, and go above and beyond to support RIAs as they strengthen those connections and continue building their businesses. We believe that RIAs need more than great tech – they need technology backed by white-glove service to get them where they need to go, with the support to answer their questions along the way.



## #1

Rated Custody Platform in Advisory Satisfaction (2021 T3/Inside Information Advisor Software Survey, and 2019 T3 Software Survey)<sup>2</sup>

## 2019

"Excellence in Customer Service Award" (Business Intelligence Group)<sup>3</sup>

## 50

"Top 50 Most Promising FinTech Solutions Providers of 2019" (CIOReview)<sup>4</sup>

## 20

Founder and CEO Robb Baldwin named "20 People who will Change Wealth Management in 2020" (Financial Planning Magazine)<sup>1</sup>



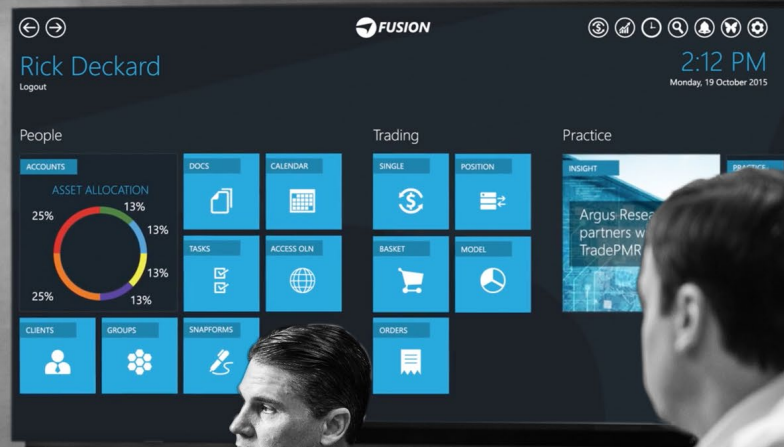
Scan for an on-demand Fusion demo today.

<sup>1</sup> Baldwin Named one of "20 People Who Will Change Wealth Management in 2020" by the editors at Financial Planning magazine, December, 2019

<sup>2</sup> T3/Inside Information Advisor Software Survey, Joel Bruckenstein and Bob Veres, March 2021, sponsored by Salesforce, and 2019 Software Survey, Joel Bruckenstein and Bob Veres, January 2019, sponsored by Orion Advisor Services and Morningstar, Inc.

<sup>3</sup> Business Intelligence Group Announces the Winners of the 2019 Excellence in Customer Service Awards; Philadelphia, PA, May, 2019

<sup>4</sup> 50 Most Promising FinTech Solution Providers – 2019, CIOReview, May 2019



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**We take an old-school approach to service and an innovative approach to technology.”**

**Robb Baldwin,  
TradePMR Founder and CEO**

# Intuitive, Innovative and Customizable Technology

## ➤ **Fusion**

Evolving from more than two decades of experience and feedback from thousands of successful advisors, TradePMR's Fusion platform offers tech solutions specifically designed for independent RIAs.

## ➤ **Flexible Technology**

TradePMR's Fusion advisor platform enables you to manage virtually every aspect of your practice with intuitive workflows. The Fusion platform is also customizable to allow integration with many leading financial software providers. Of equal importance is TradePMR's commitment to you that when you partner with us, you receive dedicated technology training, onboarding assistance and ongoing personal support.

## ➤ **Account Management**

View and search through client accounts in a variety of simple ways, including name, tax ID or account number. View details, history and account demographics with a single click. View and manage all aspects of an individual account from one easy and intuitive workstation.

## ➤ **Comprehensive Integrations**

TradePMR offers a broad array of technology integrations with some of the industry's leading providers to ensure you and your team can leverage the solutions that are the best fit for your practice. Through interconnectivity between these systems and the TradePMR Fusion platform, you can continue streamlining your workflow and expanding the services you deliver to your clients, without the unnecessary strain of navigating between disparate platforms. TradePMR offers a broad slate of API-driven single sign-on integrations, our team can also establish data feed integrations with nearly every provider in the industry.

## ➤ **Trading**

Quickly and efficiently trade on an individual account basis or on a position basis across multiple accounts. The system offers a variety of trading tools including:

- Model Trading
- Model Sleeve Trading
- Position Trading
- Basket Trading
- Trailing Stops

# “RIAs should take note – TradePMR has built one of the better RIA custodial platforms.”

– JOEL BRUCKENSTEIN,  
FOUNDER OF T3 TECHNOLOGY TOOLS FOR TODAY

TradePMR and Joel Bruckenstein (T3 Technology) are not affiliates. Securities offered through TradePMR. Joel Bruckenstein received no compensation for his endorsement of TradePMR.

## Fee Billing

The TradePMR workstation includes a robust fee system that makes it easy to process fees in a timely manner. Firm billings can be calculated quickly and easily in keeping with your preferences, including in advance or arrears, as well as using average daily balance or end-of-period values.

## Client Relationship Management

Manage your client contact information in the same environment where trades, transactions and other functions are performed. Client contacts are created at the time of account opening, enabling advisors to easily enter notes and review account demographics. Fusion also offers streamlined messaging for advisors to communicate more seamlessly with TradePMR team members. TradePMR platforms also integrate with a variety of other leading CRM solutions on the market today.

## Insight Advisor Portal

24/7 support is available through TradePMR's Insight Advisor Portal. Insight gives advisors and their staff videos and step-by-step instructions on virtually every transaction available on our platforms. From contact information to best practices, Insight is an intuitive guide to all things TradePMR and should become an indispensable resource for your practice.





*Technology and Custodial Services to Help RIAs Succeed*

Call us today at 352-480-0616 or email [Sales@TradePMR.com](mailto:Sales@TradePMR.com)

Visit [TradePMR.com](https://TradePMR.com) to learn more.