

Investnet | Tamarac announces technology integration with Salentica

By Editor Test *Thu, Jan 3, 2013*

The integration will be completed in the second quarter of 2013. Investnet | Tamarac will continue to use other CRM technology and refine its own integrated CRM solution, Advisor CRM, the company said in a release.

Investnet | Tamarac, a provider of web-based portfolio and client management software for independent advisors and wealth managers, has entered into a strategic alliance with Salentica Inc., a provider of Client Relationship Management (CRM) and Client Reporting technology solutions for wealth managers.

Under the terms of the alliance, Salentica Advisor Desk, a CRM solution, will integrate with Investnet | Tamarac's Advisor Rebalancing solution.

At the financial account level, advisors will be able to respond quickly to cash requests and other client inquiries using the integrated Tamarac Advisor Rebalancing functionality from Salentica Advisor Desk. Advisors can also adjust their clients' portfolios and account settings and access other rebalancing features from within the CRM platform.

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