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## **New fintech solutions from ASI, BondView and Envestnet**

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By Editorial Staff      Thu, Feb 11, 2016

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A new white-label robo-advisory platform, ASI Digital Advisor, was introduced this week by Advisor Software Inc., which said advisors can use the platform "to quickly enter the automated digital advice marketplace."

In a release, ASI described its Digital Advisor as "a complete solution for on-boarding and managing investment advice clients" that includes a lead-generation component (deployable from the advisory firm's existing website) and a "mobile-responsive investor portal" accessible from any web-enabled device.

The new tool is built on the ASI Wealth Management Cloud platform. ASI used APIs to build it in "modular fashion" for flexibility and scalability. APIs, or Application Program Interfaces, are replacing EDI (Electronic Data Interface) for real-time data transfer between devices.

Advisory firms that use ASI Digital Advisor can customize the interface with their own brands, their own investment options, and either a goal-based or risk-based approach to model selection.

In a goal-based configuration, clients can create multiple financial goals, track goal progress, and run Monte Carlo simulations on their portfolios. ASI Digital Advisor's administrative features allow firms to create any number of model portfolios and to monitor and rebalance any number of accounts.

Advisors can also customize client-profiling questionnaires and scoring rules, and use their own capital market assumptions. ASI Digital Advisor's integration with DocuSign enables clients and advisors to e-sign account-opening paperwork.

"With this release, we believe we have set new standards for usability, scalability and flexibility in the digital advice space," said Andrew Rudd, Chairman and CEO of Advisor Software Inc.

Advisor Software, Inc. (ASI) provides wealth management cloud platforms for financial

advisors and institutions. ASI's products address advisors' functional needs, including Planning, Proposal Generation, Portfolio Construction, Rebalancing, and Investment Analytics. The company's solutions serve asset management firms, broker-dealers, banks, insurance companies, online brokerages, custodians and other providers of investment services and products.

## **BondView**

BondView, a provider of municipal bond information and analytics, today launched the first fintech platform that analyzes municipal bond funds and their underlying bond holdings within one application.

"Now it's easy to drill down into the details of every municipal bond fund and access previously unavailable data," said a BondView release. The firm's platform tracks

more than 2,000 municipal bond funds and two million individual municipal bonds from over 50,000 issuers.

Municipal bond fund managers and investors will be able to use the service to identify funds "that could outperform their peers and avoid those with troubled holdings," according to BondView CEO Robert Kane.

BondView's suite of applications allows:

- Real-time trading data on the holdings of 2,000+ municipal bond funds
- Peer group evaluation tools to compare funds with members of their peer groups at the holdings, income, liquidity and volatility levels.
- Stress testing, monitoring and other analytics on funds and individual holdings.
- Alerts to fund portfolio changes and investment trends.
- The ability to cross-reference fund ownership with the universe of muni bonds.
- Institutional ownership on individual muni bonds.
- Detailed fund maturity schedule on all bond holdings and alerts for when new cash is available.
- Analysis of fund holdings overlap to assess diversification and concentration across portfolios.

To access BondView Fund product free beta release, go to <https://bondview.com/bond-funds>

BondView offers real-time data, including estimated prices, alerts, ratings, financial filings, rich/cheap analysis, stress-testing and trade history on more than two million municipal

bonds from more than 50,000 issuers.

### **Envestnet and TDAmeritrade**

Envestnet | Tamarac has implemented the first phase of integration between its web-based Advisor Xi suite for independent RIAs and TD Ameritrade Institutional's the Veo custodial platform.

The integration allows advisors to obtain real-time account and cash balances, addresses, beneficiaries, contacts, account alerts, trade warnings, and cost basis data for realized gains from TD Ameritrade Institutional, according to Stuart DePina, Group President of Envestnet | Tamarac.

Later this year, Tamarac expects to complete additional integrations with the Veo platform to facilitate the straight-through processing of trades within the Advisor Rebalancing application. That will enable advisors to use TD Ameritrade Institutional as their data source for Holdings, Unrealized Gains/Losses, and Transactions reports in Advisor View.

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