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## **BridgePortfolio® and The Elements Financial Group to Enhance Complete Back Office Services**

Teaming Up to Better Serve Investment Advisors and RIAs

*For immediate release:*

**Chicago, IL – March 12, 2014** – BridgePortfolio – a leading provider of back office processing services for investment advisors and RIAs – is pleased to announce a partnership with ProTools™. Founded by the same team of financial advisors and institutional experts who founded The Elements Financial Group, ProTools™ delivers the world's first virtual strategist.

Together BridgePortfolio and ProTools™, through its risk profiling and portfolio construction system, RiskPro™, will provide an enhanced complete back office solution, enabling investment advisors and RIAs to further streamline their portfolio management tasks. Advisors will be able to open accounts, develop strategies and models, and trade with speed and convenience – no switching between screens, no multiple logins, nor having to trade separately on each custodial portal. Adding this revolutionary new investment tool to BridgePortfolio's complete back office solutions further simplifies and reduces in house processes, allowing advisors to focus on their clients and increasing their bottom line.

In response to the new partnership, CEO of BridgePortfolio, Hal Sullivan, commented: “as a noted technology and services company, we continually strive to deliver leading edge solutions, such as RiskPro, to our investment advisors.” Nick Scalzo, CEO and founder of ProTools™ added: “the blend of services that we deliver together will dramatically improve the advisor-client relationship.”

### **About The Elements Financial Group, LLC**

The Elements Financial Group, and its subsidiary, ProTools™, are uniquely positioned as a premier solutions provider to the financial services industry, as they represent an unprecedented blend of talent and expertise from both the institutional and retail investment community (www.TEGAdvisor.com). The Elements Financial Group recently launched their newest ETF, YieldPro (symbol: YPRO) and in celebration will be ringing the NASDAQ closing bell on Thursday, March 13<sup>th</sup>, for more information visit: <http://bit.ly/1ekOST0>. For more information on RiskPro™, visit: <http://youtu.be/YEO3e55t3Co>.

### **About BridgePortfolio®**

BridgePortfolio's mission is to help investment advisors and RIAs profitably deliver investment advisory services, including ETFs, mutual fund wrap model portfolios, SMA, and UMA programs. Founded in 2000, BridgePortfolio, with its parent company Insignis, processes \$1.65 trillion in assets and 30,000 accounts each day. BridgePortfolio has developed a wide range of services that can be outsourced, including: trading and rebalancing, packaging and processing trade blocks, reporting, fee billing, private label website development and hosting, client portal, daily reconciliation, account opening, portfolio accounting, aggregation of held-away accounts, and more.