

BridgePortfolio Inc.

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BridgePortfolio® Releases New Products and Services

BridgePortfolio has developed and released a new deck of Performance Reports, user interface tool *AdvisorAccess*, and Mobile App Solution to better serve clients

Chicago – April 24, 2014 – BridgePortfolio announces today the release of its new *Mobile Solution* that provides immediate mobile access to client portfolio details from the convenience of a smartphone or tablet. The *BridgePortfolio Mobile App* is available now, with the option to be advisor-facing or client-facing.

With the *BridgePortfolio Mobile Solution*, users will be able to navigate household and account information including asset allocation summaries, performance and transaction summaries, holdings, account details, and more.

A leading provider of back office processing services for investment advisors and RIA's, BridgePortfolio has also developed a new deck of reports that can be run MTD, QTD, YTD, on-the-fly or for any desired time period. The new *BridgePortfolio Comprehensive Report* delivers a complete breakdown of portfolio information and is available at both household and account levels.

BridgePortfolio Inc. has also recently completed development of a new user interface tool, *AdvisorAccess*, designed to improve efficiency and extend more control to clients. This tool removes human error from updating, editing, and managing accounts and account information.

With *AdvisorAccess*, users can bypass having to contact the BridgePortfolio Operations department directly via phone or email. This convenience will further streamline the Advisors' back offices and create a simple link directly into the BridgePortfolio system.

BridgePortfolio has created these new products and services in continuation of their mission to better meet the needs of RIAs and independent advisors, and is thrilled to offer these new tools to their clientele.

To sample BridgePortfolio's new *Mobile Solution*, on your smart phone or tablet, please visit:

www.bridgeportfolio.com/mobile

Login: bpcomp

Password: bpdemo

About BridgePortfolio®

BridgePortfolio's mission is to help investment advisors and RIAs profitably deliver investment advisory services. 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.

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