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Bridge*Portfolio*® Releases BridgeView

Bridge*Portfolio* has developed and released a data aggregation solution for outside & non-managed assets, enabling advisors to view, advise, and report on their clients' complete financial landscape.

Chicago – October 21, 2014 – Bridge*Portfolio* announces today the release of its new solution for aggregating and reporting on outside/non-managed assets. The cutting edge data aggregation solution, ***BridgeView***, enables advisors and fiduciaries to obtain complete insight into all holdings and transactions with the capture of assets and performance from multiple custodians or sponsors, reconciliation (optional), and daily and/or monthly performance and appraisal reporting either at account level or consolidated into households. This allows advisors to present a ***complete breakdown of assets*** to their clients rather than limiting advisory review to solely managed assets. Clients will enjoy this service because they can see those outside 529s, annuities, 401(k)'s, and other non-managed investment vehicles alongside their managed assets for a more comprehensive view of their net worth.

With ***over 6,000 sources of data***, BridgeView comprehensively captures all assets and allows advisors to access more data than ever before. Through ***BridgeView***, the advisor can now obtain performance or appraisal reporting on all assets that exist outside of what the advisor manages. Imagine being able to see all assets at the same time, in one place, and then quickly moving to Bridge's rebalancing arm while having a holistic picture of the client's financial wallet. Advisors will now see the entire financial embodiment of their clients rather than giving financial advice and planning on a limited scope. This more expanded access to information will help advisors build trust and credibility with even their most detail oriented clients.

Bridge View is only one aspect of the automated, proven ***Bridge Platform***. Bridge has built a suite of products under one platform that will allow the advisor to spend time building relationships, automate inefficiencies, and grow their bottom and top lines. The platform starts as a typical portfolio management system (PMS) but moves well beyond your average PMS. Back-office functions, such as reconciliation, trading and model rebalancing, performance reporting, and fee billing are all part of ***Bridge's proven platform***. The countless time and dollars spent reconciling accounts, trading account by account, and figuring out complex billing is now a ***seamless, turnkey process***.

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About Bridge*Portfolio*®

Bridge's mission is to help investment advisors and RIAs profitably deliver investment advisory services. Founded in 2000, Bridge*Portfolio*, with its parent company Insignis, processes $2.3 trillion in assets and over 51,000 accounts each day. Bridge automates RIA workflow promoting growth, quality client service, and rapid response. Our comprehensive platform fosters each RIA's distinct identity and strategy with proven automation, eliminating redundancies.