

ADVISOR APPS

Connect is a commissions and operations App designed for registered reps, investment advisors and OSJ's of broker dealer firms. Connect is simple and very easy-to-use.



Connect is device and platform agnostic so compatibility is NEVER an issue. No matter how or where you log into Connect, you'll always have the same experience. Just login and it works!

SOME OF THE FEATURES

- Customizable Dashboard
- Alerts and Actionable Items
- Licensing Detail and Renewal
- Electronic Workflow
- Client Account Detail
- Mobile Client Connect
- Transactional Detail
- Top Clients by AUM, Production
- Commission Detail
- COD – Commissions-on-Demand

"Like all magnificent things, it's very simple"

