Augmented Advice™
High tech meets high touch

A business model for the digital era

Get the tools to help build scalable advisory experiences into your business while delivering human advice when your clients want it. All built on our cloud-native clearing, custody, and trading platform, Apex AscendOS™.

Augmented Advice empowers firms to embrace a new business model with a ready-made combination of solutions that can enable you to increase the number of investors you serve, while retaining your personal touch:

- Real-time intraday data and processing
- Automated advisory workflows, including rebalancing, model creation, direct indexing, and goals-based investing
- A unified workstation to minimize tab-hopping between tools
- Embeddable investing experiences, including pre-built UIs

APEX
Fintech Solutions™

Key benefits

- Streamline previously time-intensive workflows
- Launch digital client experiences more quickly
- Unlock organic growth by reaching next-gen investors earlier in their wealth accumulation journeys

Key features

Cloud-native time savers

Choose digital-first custody and clearing

- Real-time account opening
- Real-time funding
- Real-time cash management
- Real-time trading and best execution
- Real-time reporting and business intelligence data

Pre-built end-investor UIs

Use investor-facing UIs built to help them self-service all major tasks

Highlight your brand, not your custodian's

Support a range of advisor interaction models, from self-directed robo to advisor-managed

Ascend Advisor Workstation

Work more efficiently with a unified interface, intuitive navigation, and reduced tab-hopping

Assign the right access to the right team members with role-specific permissions

Direct indexing

Reduce the barriers to entry with minimums as low as $10k while automating this time-intensive process for advisors

Fractional share capabilities

Make even the smallest accounts feel like valued relationships

Out-of-the-box embedded investing

Get configurable risk tolerance or goal-based investment questionnaires, directly integrated to portfolio mapping algorithms and our Rebalancer API

Apex Rebalancer

Perform rebalancing across thousands of accounts down to fractional share level in seconds

See proposed trades for all portfolios in one UI

Use automations to reduce the operational burden of offering sophisticated tax loss harvesting and goals-based investment models

Model Marketplace

Access a library of models by major professional asset managers to help reduce time spent building them

Choose the right funds for your clients without pressure to select specific ones

Integrations Marketplace

Get the solutions you need to help build your tech stack the way you want, using the third-party tools you already have

Apex Insights

Use built-in business intelligence tools with actionable insights as client portfolios grow in complexity

Curious about Augmented Advice? Let's talk.

Your firm didn't ask for digital disruption. Thrive anyway. Learn how Augmented Advice can redefine efficiency, scale, and success for your advisory firm.

Request a Call

Apex Fintech Solutions provides the tools and services that enable hundreds of clients to launch, scale, and support digital investing for tens of millions of end investors. The company provides essential infrastructure and a comprehensive ecosystem of cloud-based products to enable and streamline trading, wealth management, cost basis, tax reporting, and, through its subsidiary Apex Clearing™, custody and clearing. For more information, visit the Apex Fintech Solutions website: https://www.apexfintechsolutions.com.

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