



Kovack Securities: Albridge Solutions (PortfolioOne)

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Agenda

- Site navigation
- Running client / advisor reports
- Householding

Albridge (PortfolioOne)

- Albridge / PortfolioOne / Pershing X
- Data aggregation for brokerage / direct / advisory business
- Two versions – Light and Full
- Client access
- Performance reporting
- Batch jobs

Albridge (PortfolioOne)

LIVE DEMO...



Albridge (PortfolioOne)

QUESTIONS?