



Wealth Management Accelerator



MULTI-CUSTODIAL DATA AGGREGATOR

Your single source of truth for hundreds of data feeds

Our Multi-Custodial Data Aggregator leverages ShellBlack's Salesforce expertise and BridgeFT's cloud-native wealthtech solutions to channel insights from 900+ data feeds into Salesforce Financial Services Cloud (FSC). For \$30 per user, per month, plus a one-time setup fee, FSC users with a BridgeFT subscription can tap into comprehensive, accurate client data to help fuel business growth.

	Portfolio Management Systems Connectors	ShellBlack + BridgeFT Multi-Custodial Data Aggregator
Complete Person/Individual Accounts	✓	✓
Sync Financial Accounts	✓	✓
Sync Financial Holdings		✓
Sync Tax Lots		✓
Total Wealth Data Aggregation Across 900+ Data Sources		✓
Multi-Tiered Matching Logic Synchronization		✓

Top Providers Supported

- Schwab Advisor Services (Charles Schwab)
- Fidelity Institutional
- Pershing Advisor Solutions
- Pershing LLC
- National Financial Services LLC (NFS)
- Apex Clearing Corporation
- DST Financial Advisor Network
- Interactive Brokers



SAVE TIME. SAVE MONEY. **GET STARTED.**
Scan to learn more



shellblack.com

YOUR TRUSTED SALESFORCE PARTNER

ShellBlack is a proven and trusted Salesforce partner with a select focus on the financial services industry. Our certified consultants are experts in the implementation and configuration of Salesforce, providing customized solutions to streamline the way you market your brand, sell your products and services, and support your customers. We drive customer success with Salesforce by focusing on business processes, data insights, usability, and adoption.

ShellBlack.com/BridgeFT



Financial Services Cloud Multi-Custodial Data Aggregator



Cloud-Native Collaborator

Our Multi-Custodial Data Aggregator was developed in partnership with BridgeFT, a wealth infrastructure software company offering the industry's only API-first, cloud-native wealthtech-as-a-service platform. BridgeFT's software solutions support the critical data, analytics, and application services needed to build next-generation wealth management applications.



SAVE TIME. SAVE MONEY. **GET STARTED.**

Scan to learn more



shellblack.com