



Linedata OMS and Trading for Wealth Managers

Modern, highly configurable portfolio management with personalized tools for advisors, supported by a high performance OMS and trading engine

Generational wealth is in transition, with as much as 80% at risk of moving to a new wealth advisor.

Ensuring your firm is well positioned to onboard new advisors and their clients quickly, manage portfolios effectively, and engage a new generation of investors is critical but harder than ever. Swivel chair syndrome, dealing with multiple, fragmented systems, is costly and time consuming leading to reduced efficiency as well as investor dissatisfaction.

Linedata's OMS and trading solution for wealth managers helps you meet these challenges head on. Modern, web-based tools enable advisors to monitor portfolios with a top-down view of business and streamline workflows by introducing actionable dashboards and exception-based alerting to direct them to areas of attention and empowering them to quickly implement informed decisions.

Why choose Linedata?

- We've collaborated with wealth managers for over 20 years on a robust, configurable front office that simplifies your workday.
- Our team of experts understand that a modern wealth ecosystem includes access-anywhere, cloud based, UX-rich capabilities alongside the best of your firm's infrastructure, APIs, and extensibility to help differentiate your business and optimize the value of your platform.

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Linedata's offering is perfect for us because its high-performance, customizable platform gives our company the flexibility and scalability to meet the growing needs of our advisors and customers.”

CEO, Wealth Manager \$30B AUM

Redefine and scale your business



Efficiency

Onboard and manage new business quickly

Save time and resources with efficient portfolio management tools, web access and fewer manual processes. Bring on business quickly with streamlined onboarding capabilities.

Increase trading capacity with an elevated level of throughput, performance, and speed. Advisors easily review at book of business or individual portfolio level to rapidly implement investment decisions.



Satisfaction

Attract and keep advisors

Improve daily UX with fast, user-friendly portfolio management, trading, rebalancing, and model management tools.

Top down, strategic portfolio view enables informed monitoring, with interaction and updates via personalized alerts.

Facilitate connection to the all-important wealth transition generation. Whether the need is self-service or white glove, Linedata's solution lets advisors engage, report, and communicate to clients anywhere in real time.



Value

Maintain differentiation and improve tech platform value

As the wealth and UHNW market heats up, competitive differentiation is as critical as maintaining a flexible, efficient technology backbone.

Benefit from Linedata OMS' extensibility, which leverages your current infrastructure and complex systems. Our collaborative approach supports part-build/part buy, so you maintain important firm integrations, with a strategy that values your existing technology ecosystem.

Faster onboarding and superior efficiency increase value for advisors and their clients. That's the power of Linedata.

- **Search and manage 50,000 models at once** Locate and quickly make changes, apply, and see model implementation
- **Manage more clients** Minimize manual processes for responsive, accurate service
- **Experience better trading** FIX fill processing at 700 fills per second
- **Rebalance across thousands of accounts** Manage simultaneously with no backlog

Linedata Asset Management

We offer a robust, configurable platform of software, data and services that enable our clients to grow, operate efficiently, manage change and provide excellent service to their own clients and stakeholders.

Linedata OMS and Trading

Simplify how wealth managers and advisors manage portfolios, onboard new business and interact with clients with access-anywhere, cloud based, UX-rich tools supported by a highly performant engine.

About Linedata

For 25 years, Linedata has been providing global humanized technology solutions and services for the asset management and credit industries that help its clients evolve and operate at the highest levels.

700+
Clients

20
Offices

1,100
Experts

✉ To speak with us or to book a demo, please get in touch: linedata.com/contact