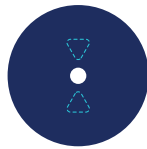


Integration overview

Our custom API integration with Addepar ensures you always have the most up-to-date information on your clients' financials. The one-way data sync from Addepar to Practifi brings over key Asset, Liability and Holding data so you can access a unified view of clients' important financial information, track AUM growth across the firm and improve operational efficiency by identifying your most profitable clients.

For more information on how to set up and use the integration, head to our [Knowledge Base](#) and search for "Addepar Integration". Alternatively, [reach out to a member of our team](#) to learn more.

Benefits for you



Unified client view

Reduce the need to switch between platforms. View clients' important financial information within Practifi



Track AUM growth

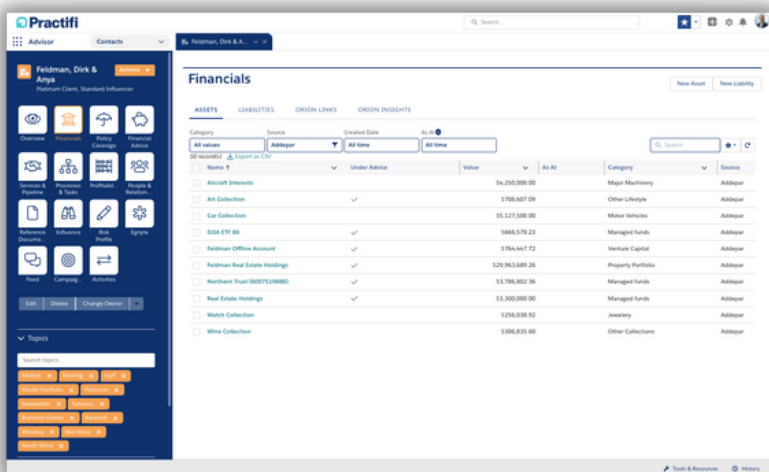
Track client, advisor, division and firm AUM growth by syncing clients' assets to Practifi



Monitor profitability

Identify your most profitable clients by bringing AUM and other key profitability metrics together in Practifi

Feature overview

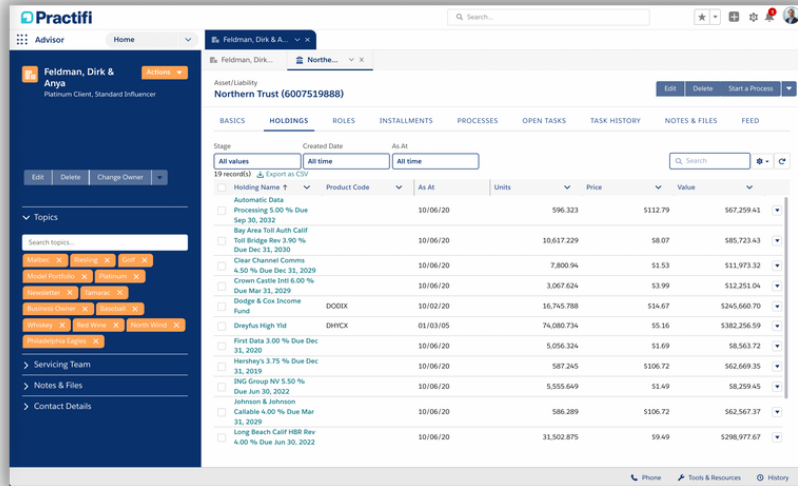


View Assets & Liabilities

Easily view all client Assets & Liabilities in Practifi, including their value, category and whether they are under advice.



Feature overview

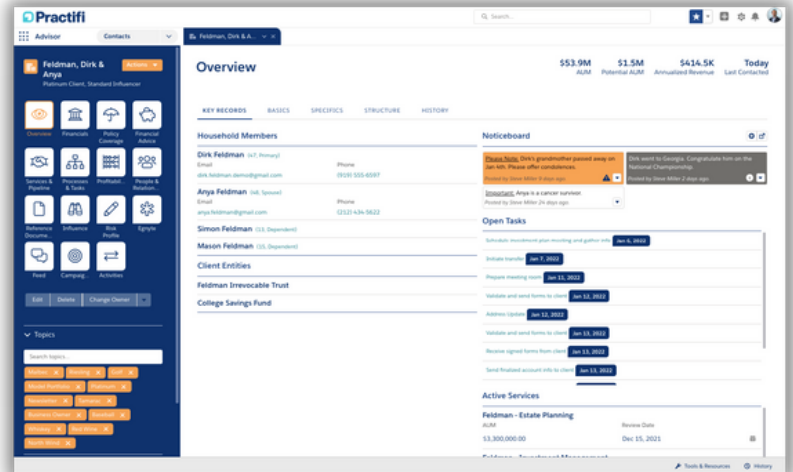


View Holdings

View detailed Holdings information such as units, price, value and date synced from Addepar.

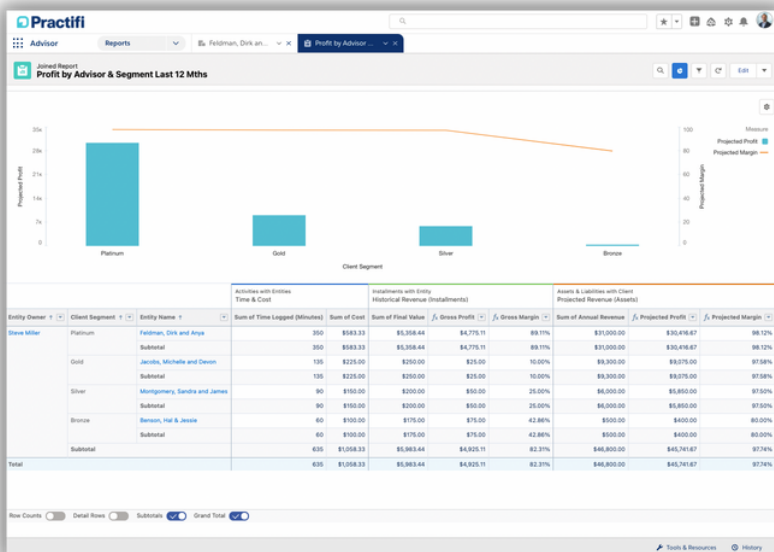
Track AUM Growth

Asset & Liability values roll up to display AUM per client. Reports enable you to track AUM growth per advisor, division and firm.



Identify profitable clients

Syncing client AUM helps you identify which clients have the lowest cost to serve and bring in the most revenue for the firm.



Get in touch with a member of our team to learn more.

