Technology Solutions

We are recognized as a global leader supporting the technology needs of over 1,150 institutional and retail financial organizations and independent registered investment advisors. We offer solutions for each level of your business and strive to continually add functionality to improve back-office efficiency and to streamline brokerage activities for investment professionals and their clients.

Customer Technology Needs	Pershing LLC	iNautix (USA) LLC	
	Business Executed with Pershing	Enterprise Wide	
Broker-Dealer	**NetExchange Services™** › Flexibility in choosing front-end platforms › Seamless integration of critical processes › Leverage Pershing's core processing systems › Access your important brokerage information	**Enterprise Portfolio Management** › Reporting › Investment professional monitoring › Connectivity to all systems	**Compensation Management** **Data Warehousing and Analytics** **Document Management**
	NetExchange Office › Account opening › Asset movement › Workflow › Service Center		
Investment Professional	**NetExchange Pro®** › Account management › Trading › Data analytics › Operations › Financial planning › Investment tools › Market data, news, and research	› Performance reporting › Single client view › Client management › Practice management	**Sales Practice Monitoring**
Investor	**NetExchange Client®** › Account access › Online documents › Online trading › Account performance › Market data, news, and research	› Online access › Consolidated views	
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