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Grow your business by putting a better investment experience in your advisors and customers' hands with the Digital Advisor Platform from Advisor Software, Inc.

Tax Aware Rebalancing API: Our Rebalancing API provides a sophisticated, rules-based engine that facilitates the initial balancing - and subsequent rebalancing - of one or more accounts to a model portfolio based on your unique constraints. The API may be used as a standalone API associated with any data held in the ASI database rebalancing individual accounts or entire households. User-defined constraints include Locks, Cash Buffers, Equivalencies, Minimum Trades, Tax Strategies, etc.

Monte Carlo Simulation API: Our MCS API analyzes in milliseconds, generating a future projection based on your capital market assumptions. The payload allows an unlimited number of income and distribution streams sufficient to model a household typical cash flow and can be set for each tax treatment and rebalancing periods. Used in conjunction with household goals, MCS will provide a probability of success and recommended investment action when off track. API output is both numerical data points and a 64bit image.

Portfolio Optimization API: Generates your unique efficient frontier based on your assumptions with plot points for each risk profile. Enables efficient portfolio construction and validation of model available from asset managers, together with a review of existing client's portfolios.

Portfolio Risk APIs: The Portfolio Risk Analysis API analyzes a target portfolio against any number of portfolios to determine overall portfolio risk, based on 19 risk factors, 55 industries, and 12 industry sub-sectors. The results are presented at both the portfolio and individual security/fund level. Our Portfolio Shocks API performs a scenario analysis for a portfolio or portfolio set, greatly simplifying the process of back-testing portfolios against a historical event, this cover both positive and negative US and International market movements

Portfolio Analytics APIs: Besides the APIs mentioned above, ASI provides over 250 API enabling our clients to build or enhance their own user experience. Many of our API focuses on portfolio analytics reviewing anything from an individual fund to an entire household of accounts.

250+ APIs can create your unique, seamless advisor & client experience
Want to know more? Contact us and request a demo.

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