NEWS

For Immediate Release

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Kwanti Announces New Integration with Altruist

Kwanti/Altruist link offers a frictionless experience to financial advisors using both platforms

SAN FRANCISCO, CA (October 4, 2023) – Kwanti, a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently announced a new integration with Altruist, a modern custodian built exclusively for RIAs that combines a self-clearing brokerage firm with intuitive software for account opening, trading, reporting, and billing – all in one streamlined solution. Accounts held at Altruist can now be linked into Kwanti, with portfolio data refreshed every night from Altruist to Kwanti.

"The value of a great piece of advisor tech evaporates if it doesn't play well with the rest of the stack," said Jason Wenk, Founder and CEO of Altruist. "Now, through our partnership with Kwanti, we're able to offer a frictionless experience to RIAs that want to pair Altruist's digital account opening and trading with Kwanti's powerful suite of portfolio analytics."

Advisors using both Kwanti and Altruist can leverage Kwanti's comprehensive suite of analytics – including detailed allocation drill downs, expense and income analysis, and stress testing client portfolios – and now have the ability to view actual performance data that is reconciled daily for their Altruist accounts. Both positions and history are transferred and are refreshed daily with data from previous close.

In addition, Kwanti's intuitive interface makes it very easy to compare advisors' user accounts, which they can now seamlessly import to models in Kwanti and access all the model management capabilities of the platform.

"Altruist has captured the attention of numerous advisors who already use Kwanti's portfolio analytics," said Christophe Gauthron, CFA®, Founder and CEO of Kwanti. "Our tight integration with Altruist simplifies the tech stack by allowing advisors to manage their client portfolios, analyze models, and prospect for additional business – all within a single framework."

The Kwanti/Altruist link is now available to both new and current users at no additional cost. To learn more about the integration, please click here to visit the Kwanti blog. Additional details on how to activate the link can be found in Kwanti's documentation.

Kwanti offers a free 30-day trial, with no software to install and all features available during the trial. Financial advisors and other interested parties can click here to sign up for the free trial or click here to watch a demo.

ABOUT KWANTI

Founded by Christophe Gauthron, CFA® and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit www.Kwanti.com.

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