

NEWS

For immediate release

REDI2

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Redi2's BillFin™ Now Available on the Raymond James RIA & Custody Services Platform

*Hosted fee billing solution helps advisors ensure that their
billing practices can withstand regulatory scrutiny, in addition
to enhancing their efficiency*

BOSTON [May 25, 2021] – [Redi2 Technologies](#), Inc., the premier provider of hosted fee billing and revenue management solutions to the global financial services industry, announced that Registered Investment Advisors (RIAs) partnering with [Raymond James' RIA & Custody Services \(RCS\) division](#) will now have access to Redi2's BillFin™ advanced fee billing solution. Advisors will have the option to use BillFin directly from their Raymond James advisor portal with a click of a button.

“We're committed to offering advisors on our RIA platform access to industry-leading expertise and high-touch support as they continue to serve their clients and grow their businesses,” said Greg Bruce, head of RIA & Custody Services at Raymond James. “Our new agreement with Redi2 allows client firms access to BillFin's best-in-class, customized billing solution, which is fully integrated within Raymond James' Advisor Access portal. We're excited to launch this offering in RCS to help create efficiencies and streamline billing processes and procedures while minimizing risk.”

The BillFin solution, which is currently used by more than 670 advisory firms, provides multiple benefits, including:

- Flexible billing setup
- Flexible billing templates

- Simple, intuitive user experience
- Reminders and alerts
- Prorated billing
- Embedded reporting and analytics
- Fee splitting module

“We are excited to have completed our successful integration with Raymond James,” said Redi2 President & Chief Operations Officer, Fermin Garcia. “I’m impressed by the rapid adoption that we’ve had of the BillFin solution by their independent advisor community; we are getting really positive feedback about the difference it is making in improving the efficiency of their billing operations.”

ABOUT REDI2 TECHNOLOGIES

Headquartered in Boston, Redi2 Technologies offers purpose-built, comprehensive, hosted revenue management platforms to the global financial services industry, serving wealth and investment management firms with aggregated assets under management of more than \$9.4 trillion. Since its founding, Redi2 has leveraged technology to automate client reporting, fee billing and invoicing for wealth and investment managers. Redi2 is a Software as a Service (SaaS) pioneer and a market leader in vendor-hosted fee billing for firms of all sizes. For more information, visit www.redi2.com.

ABOUT RAYMOND JAMES RIA & CUSTODY SERVICES DIVISION

Raymond James RIA & Custody Services Division provides custodial and support services to independent Registered Investment Advisors (RIAs) and custody and clearing services to broker/dealers. Raymond James is uniquely positioned as a full-service clearing and custodial firm that offers high-touch support, wealth management services, turnkey technology, custom lending solutions, research, marketing support, investment banking, clearing services and more to individuals and institutions. Raymond James has provided custodial services to RIAs since 2001 (formerly through its Investment Advisors Division) and custodial, correspondent and clearing services to broker/dealers since 1982 (formerly through its Custody & Clearing Division). The two divisions were consolidated into the firm’s RCS division in 2020. Learn more at www.raymondjames.com/advisor-opportunities/affiliation-options/ria-and-custody-services.