

NEWS



FOR IMMEDIATE RELEASE

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AssetBook and Wealthbox Team Up to Enhance Advisor Experience

Financial planners and investment advisors can now seamlessly incorporate client contact records from Wealthbox into the Pulse by AssetBook platform

Wilmington, DE [August 24, 2021] – [AssetBook](#), a SaaS-based portfolio monitoring and reporting solution, today announced that they have completed integrations with [Wealthbox®](#) CRM, a modern client relationship management tool. Wealthbox helps financial advisors better manage workflows and client relationships. The Pulse by AssetBook platform provides financial advisors and broker-dealers a customized solution with a dynamic yet simple user interface that leaves time for what matters most, the advisor’s clients.

“We are thrilled to have completed the integration with Wealthbox,” said Marwa Zakharia, CEO of AssetBook. “AssetBook strives to provide the best possible service and user experience to our clients and having an integration with one of the industry’s fastest growing CRMs helps us continue to make good on that promise.”

“AssetBook offers advisors who use Wealthbox a simple and fast way to connect their clients’ information across platforms,” said Steve Carroll, Head of Product at Wealthbox. “The integration frees up advisors to spend more time with clients instead of wasting it on duplicative data entry. We’re delighted to welcome AssetBook to the Wealthbox community.”

WEBINAR SCHEDULED FOR SEPTEMBER 22

Interested advisors and journalists are invited to register for a live webinar on September 22, 2021, at 2:00 pm ET to learn more about the AssetBook/Wealthbox integration.

It is free to attend but spots are limited:

https://us02web.zoom.us/webinar/register/9016280124781/WN_XM8JuP6mTy6FOqUg3rYIog

ABOUT ASSETBOOK

AssetBook consolidates your data to provide clients a comprehensive and meaningful financial picture within a simple yet powerful custom solution. AssetBook is powered by a skilled and tenured staff that collectively has over 320 years of experience in the financial services industry. AssetBook's highly-regarded technology and their "full team ahead" approach have received favorable comments from industry influentials and financial professionals who use the AssetBook platform to better serve their clients. For more information or to schedule a demo, visit www.AssetBook.com.

ABOUT WEALTHBOX

Wealthbox is a leading CRM software application that helps financial advisors manage their clients and collaborate as a team. Integrated with custodial platforms and complementary wealth-tech products, Wealthbox's modern product design offers simplicity in the user experience that's combined with powerful CRM features. Wealth management firms, advisor networks, and broker-dealers use Wealthbox to help them serve clients, streamline operations, and grow their businesses. Wealthbox is owned by Starburst Labs, Inc. Learn more at www.Wealthbox.com.

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