

# NEWS

**For immediate release**

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## Redi2's BillFin™ Now Available on the SSG Platform

BOSTON and SAN DIEGO [June 4, 2020] – [Redi2 Technologies](#), the premier provider of hosted fee billing and revenue management solutions to the global financial services industry, and [Shareholders Service Group](#) (SSG), which provides brokerage and custodial support services for independent Registered Investment Advisors, have announced that advisors working with SSG now have access to Redi2's BillFin™ advanced fee billing solution.

“We are excited to have completed our recent integration with SSG” said Redi2 CEO Seth Johnson. “Now, advisors who have business with SSG have access to our BillFin solution.”

The BillFin solution, which is currently used by more than 500 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

“Advisors require solutions that help them in various aspects of their business that include efficiency, compliance, economics, while delivering an excellent client experience,” said SSG President Dan Skiles. “BillFin assists in these areas with helping advisors ensure that their billing practices can withstand regulatory scrutiny, in addition to enhancing their efficiency – with the push of a button.”

### ABOUT SHAREHOLDERS SERVICE GROUP

Shareholders Service Group (SSG) provides custodial services exclusively for independent registered investment advisors (RIAs). SSG is dedicated to helping RIAs succeed in working with their clients by providing the best overall platform of investment solutions, service and technology. SSG was the highest-rated custodial platform in the 2020 T3/Inside Information Advisor Software Survey. Employees of SSG have an average of over 19 years of experience in serving the needs of independent RIAs. This experience allows SSG to deliver the “SSG Same-Day Promise” which means that service requests received by noon receive same-day attention. The company was founded in 2002 and currently serves approximately 1,600 independent RIAs. Learn more at: [ssginstitutional.com](http://ssginstitutional.com)

## **ABOUT REDI2**

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](http://www.redi2.com).

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