

‘NEWS



For immediate release

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Redi2's BillFin™ Selected by CircleBlack for Advanced Fee Billing Partner

Kingston, N.J. and BOSTON [Feb. 18, 2020] – [CircleBlack](#), a wealth management platform that provides financial advisors with all the tools necessary to manage their clients and portfolios while seamlessly integrating a practice's technology applications, today announced that it has selected [Redi2 Technologies' BillFin™](#) solution, as their provider of hosted advanced fee billing, which will be available through the single sign-on hub that is a hallmark of the CircleBlack experience. "In everything we do, our goal is to leverage and seamlessly integrate best in class technology such as Billfin allowing advisors to focus on serving clients rather than managing different technology applications," said John Michael, CircleBlack CEO.

The BillFin solution, which will be provided to CircleBlack advisors as part of their platform, provides advisors with a number of benefits, including:

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

"In addition to facilitating billing and increasing advisor efficiency, BillFin helps advisors with regulatory compliance," said Redi2 CEO Seth Johnson. "The SEC and DOL have stressed the importance of advisors providing fee transparency. Our solution will help CircleBlack advisors ensure that their billing practices can withstand regulators' scrutiny."

ABOUT CIRCLEBLACK

Founded by John Michel and a team of experienced financial innovators in 2014, CircleBlack provides financial advisors with technology that aggregates data, integrates other financial

applications seamlessly, provides actionable intelligence about client portfolios and helps advisors better manage clients' wealth which helps grow and deepen advisor-client relationships. CircleBlack's platform leverages three pending patents that help sustain CircleBlack's unique competitive advantages. CircleBlack believes in making wealth management better, for both the investor and the advisor. The platform is built for the 21st Century in a web-based application format that can be taken anywhere and accessed anytime, through a computer, tablet or smartphone. For more information about CircleBlack, visit www.circleblack.com.

ABOUT REDI2

Headquartered in Boston, Redi2 Technologies offers a comprehensive, SaaS revenue management platform to the global financial services industry, serving investment management firms with aggregated assets under management of more than \$5.5 trillion. Since its 2002 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.