

CLIENT PORTAL COMPARISON

Platform Characteristic:	AdviceWorks™	NetXInvestor™	Albridge Wealth Reporting™
<i>Can view account type:</i>			
Pershing LLC	•	•	•
Cetera Investment	•	•	•
Accounts held elsewhere ¹	•		•
<i>Can view/save printable:</i>			
Electronic reports	•		•
Electronic monthly statements	•	•	
<i>Can access:</i>			
Transactions by account type	•	•	•
Tax doc history since account opening	•	•	
<i>Client capabilities</i>			
Opt-in or opt-out of e-delivery	•		
Manually add bank, investment accounts	•		
Upload/share docs with advisor	•		
Upload docs to private folder	•		
Client-dedicated support telephone line	•		
Open/service an account electronically	•		

¹Account held elsewhere must have your Sunrise advisor as the named rep of record and the account company must be supported by the Albridge Wealth Reporting platform.

AdviceWorks™

NetXInvestor™

Albridge™



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