ALBRIDGE Wealth Reporting™

Service Signup Form

Fax form to: 402/384-7562
Field Technology

Your Web-Based Consolidated Reporting Solution!

Albridge Wealth Reporting is a web-based consolidated performance reporting application that allows you to produce client reports on demand. With **Albridge Wealth Reporting**, you can quickly create and distribute a performance reports that includes household activity and returns, holdings, and benchmark returns. An optional client view feature allows you to extend report capabilities to clients online utilizing a password protected secure connection and the **CashEdge** aggregation feature gives advisors access to an investor's complete portfolio. With that **Albridge/CashEdge** holistic view, advisors can make better-informed decisions about the assets they manage, as well as position themselves to capture held-away assets. The **AdvisoryWorld** application is a valuable tool that gives advisors the ability to launch investment fact sheets, detailed analytics and proposals directly from the **Albridge Wealth Reporting** application.

Base Service Level Options:

Performance Reporting (Choose One)

- ☐ **Albridge Wealth Reporting Advisor Use Only ……………………………….. $150/month**
- ☐ **Albridge Wealth Reporting Advisor Use PLUS Client Online View ….…….. $200/month**

Optional Additional Services:

Aggregation Service (**requires Albridge client access version):

- ☐ **CashEdge Account Aggregation ….…………………………………………… $100/month**

Analytical Tools (Choose One)

- ☐ **AdvisoryWorld Reports ……………………………………………………... $60/month**
- ☐ **AdvisoryWorld SCANalytics ….…………………………………………….. $95/month**
- ☐ **AdvisoryWorld SCANalytics Pro ….………………………………………… $115/month**

*Fees listed for optional services are in addition to the base subscription level you select
**Prices are subject to change. You will be notified via the Secure Message Center prior to any changes

Albridge Wealth Reporting subscriptions are subject to a 12 month minimum term. I understand and agree to a 12 month minimum subscription term for the Albridge Wealth Reporting application.

Rep Name: ______________________________ Rep Number: ________________________
Signature: _______________________________ Date: _______________________________

By signing this form, I agree to the terms outlined on this form and consent to having the monthly fee billed to my representative number and deducted from my commission statement at the rate indicated by the service level I have selected above. *The setup process will take between 3 – 5 business days. Once completed, you will receive information in your Secure Message Center with instructions on access and use of the Albridge Wealth Reporting application.

Please contact the Albridge Support Team at 866/501-0581
with your questions after access to these applications have been established.
****Please note this service number is for Advisor/Rep use ONLY ****

After your 12 month required subscription period is complete, any cancellation requests must be received on or before the 27th of the month you wish to cancel. Late cancel notification will result in an additional month charge (with full access to the service for the appropriate time). There are no refunds for partial month usage. Use your Secure Message Center to contact the Field Technology group with your cancellation request.

Securities America