



BridgePortfolio®

Cure your back office blues.®

Fee Reporting Solution

Back office work is important, but it can take your focus away from building your ideal business. When you have to attend to time- and revenue-consuming back office chores, you have less time to focus on your clients and making your business grow. Using BridgePortfolio's solutions will cure your back office blues™ and help you refocus on your business.

BridgePortfolio Takes the Blues Out of Fee Reporting

Your clients use your services because you have expertise that they need. In turn, you expect to be paid for your services.

In the past, you've had to set up a schedule, run calculations through your PMS, review them, list deductions for your advisory fees and then send them to a variety of custodians.

Here's what you do when you use BridgePortfolio's Fee Reporting solution: You review the fee reports online.

That's all. BridgePortfolio takes care of the rest, and you don't need a PMS. BridgePortfolio's online solution will:

- Set up a fee schedule according to your perimeters.
- Run fee reports.
- Provide the reports online for you to review.
- Allocate fees to all the custodians you use.

Like all of our solutions, BridgePortfolio puts the fee reporting tools you need online, on a secure, private-labeled website, so that you or your clients can access them anytime, anyplace, anywhere.

The Cure Is a Call Away

Call BridgePortfolio today. Using BridgePortfolio's Fee Reporting solution will help you focus on what you do best. Ask us about our other services - ranging from portfolio accounting and trade modeling to reporting and comprehensive account solutions - that will cure your back office blues while building your ideal business.