

NEWS

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TradePMR Rolls Out Refined Trading Tools on Top-Ranked Custodial Platform Fusion

New integration with Flyer available to automate trading with third-party portfolio management and rebalancing platforms.

GAINESVILLE, Fla. [March 11, 2020] – Registered investment advisors seeking alpha now have access to modern trading tools that enable an advisor to quickly streamline an advisor’s day-to-day operations. [TradePMR](#), a technology and custodial services provider that works exclusively with Registered Investment Advisors, has announced multiple trading updates to its top-ranked¹ custodial platform, Fusion. Enhancements include sleeve trading capabilities for model strategies and portfolio options hedging for advisors looking to generate more yield through options strategies. The firm has also integrated with [Flyer Trading Network](#), Flyer’s advanced, multi-asset network, to streamline trading.

MODEL STRATEGIES WITH REAL-TIME ASSET CLASS ALLOCATION

Advisors can now build a customized portfolio strategy made up of existing models to develop a sleeve within Fusion. Strategies provide real-time asset class information utilizing a direct integration with Morningstar². An integration with FinMason² provides risk scoring and strategy analytics directly in Fusion. Advisors are able to rebalance across the strategy or at the account level or at the model sleeve level.

“Customizing at scale can be a daunting task, said Robb Baldwin, founder and CEO of TradePMR. “2020’s market volatility is a perfect reminder to us all – it seems that investors need their financial advisors more than ever. In my opinion, sophisticated trading tools are a necessity to thrive and effectively manage overall portfolio strategies for clients.”

FLYER TRADING NETWORK CONNECTS ADVISORS AND THEIR PLATFORMS TO TRADEPMR

TradePMR partners with Flyer², a provider of trading tools, connectivity and infrastructure for the wealth management industry, to automate advisor trading using Flyer Trading Network (FTN). Advisors using third-party portfolio management and rebalancing platforms may now electronically trade equities, including ETFs, and mutual funds intraday. FTN streamlines the advisor trading experience by eliminating the need to export and upload order and allocation files across multiple platforms.

“Our partnership is a natural fit with TradePMR,” said Brian Ross, CEO at Flyer. “We believe the integration allows TradePMR advisors to be more efficient and control a broader array of market opportunities for their investors.”

FTN standardizes and manages the connections between advisor platforms and TradePMR with a unified API for trade and post-trade workflows.

HEDGING STRATEGIES AT THE PORTFOLIO LEVEL

Fusion’s new Options Hedge feature gives an advisor the ability to automatically generate a covered call or protective put position across multiple accounts at the portfolio level, based on advisors’ hedge settings. Advisors can monitor their options positions and quickly close or roll into a new strike price position or expiration using Fusion’s new option summary report.

“Advisors today are regularly challenged by their clients to prove their worth. Navigating volatility with spread strategies is something advisors can take advantage of today in Fusion,” stated Baldwin. “In my opinion, managing an options portfolio can demonstrate their skills and differentiate their value.”

Advisors interested in a demonstration of the new features available in Fusion, please contact sales@tradepmr.com.

ABOUT TRADEPMR

For more than two decades, TradePMR has worked with growth-minded independent registered investment advisors (RIAs) helping to provide the innovative technology tools and support designed to transform their businesses. The privately-held brokerage and custodian services provider (Member FINRA/SIPC), based in Gainesville, Fla., works to streamline fee-only investment advisors’ operations through comprehensive custodial, operational and trading support. For more information, visit www.TradePMR.com.

Follow TradePMR on [Twitter](#), [Facebook](#), and [LinkedIn](#) for the latest news, updates and event information.

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ABOUT FLYER

Flyer is a provider of trading tools, connectivity, and infrastructure for the wealth management industry. Flyer automates the trade lifecycle with Co-Pilot, an order management system, and Flyer Trading Network, a multi-asset trading network. The platform unifies access to major custodians and brokers while providing intelligent Graphical User Interfaces (GUIs) and Application Programming Interface (APIs) for managing positions, orders, trades, and allocations.

For more information about Flyer, please visit co-pilotflyer.com and follow @FIXFlyer.

¹ [2019 Software Survey by Joel bruckenstein and Bob Veres](#), Sponsored by Orion Advisor Services and Morningstar, Inc.

² FIX Flyer, LLC, FinMason, Inc. and Morningstar, Inc. are not affiliates of Trade-PMR, Inc.

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