

intelliflo

redblack



Manage complex portfolios at scale

A premium solution tailored to your specific needs.

Offer greater value to your clients with best-in-class technology that helps you manage your firm's unique investment management approach efficiently, accurately and reliably.

intelliflo redblack provides comprehensive rebalancing and trading capabilities with portfolio monitoring, pre-trade and post-trade compliance, and order management, all within a single solution that seamlessly integrates with your current tech stack.

Improve your rebalancing & trading processes with:

Rapid ROI:

An intuitive user experience and personalized training enable you to get up and running quickly.

Reduced operational costs:

Manage and trade more efficiently with streamlined workflows that increase margins while decreasing operational costs.

Seamless growth:

Our modular solution is flexible enough for RIA firms of any size, and automatically scales with you as you grow.

Agile market response:

Quickly respond to market movement with the ability to direct trades across thousands of portfolios in minutes.

Open architecture:

intelliflo redblack integrates seamlessly with your current tech stack, and interfaces with all major custodians and brokers.

Compliance protection:

Real-time compliance and restriction validation ensures your clients are always invested according to their specific needs and investment policy statement.

Improved performance and operational efficiencies:

Do more in less time to enhance portfolio performance with automated rebalancing and trading strategies applied promptly to client portfolios.

Why choose intelliflo redblack?



Reduce potential violations with investment policy overlays, rules and restrictions



Contextually review and conditionally approve orders prior to execution



Rebalance accounts and households



Leverage FIX for straight-thru processing



Manage orders for multiple custodians and set up trade approvals



Monitor portfolios at the account and household level for drift, cash, compliance violations and tax opportunities

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