

## NEWS

**For immediate release**

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## **FolioDynamix, Redi2 Integrate to Better Serve Financial Advisors**

### *DOL Rule, Ability to Scale Drive Decision*

BOSTON and SACRAMENTO – May 3, 2017 – [Redi2 Technologies](#), the premier provider of hosted fee billing and revenue management solutions to the global financial services industry, announced its integration with [FolioDynamix](#), a leading wealth management technology solution provider. The collaboration of these two leading companies in the financial service industry offers enhanced functionality and transparency previously unavailable to advisors scrambling to keep up with the new DOL Fiduciary Rule.

“For the asset managers and financial advisors who provide services through managed accounts, the need for a sophisticated billing solution is critical,” said Redi2 President and COO Fermin Garcia. “Our expertise in addressing the complexities of billing and revenue management makes us an ideal partner for FolioDynamix. We look forward to helping them support their advisor clients.”

“For advisors, having an efficient UMA program has never been more important,” said FolioDynamix President Steve Dunlap. “Given this, and the DOL focus on fee transparency, we are committed to providing technology that can optimize advisor productivity and minimize program administration. Redi2 is an expert in revenue management systems, including ones designed to specifically handle managed accounts. We are thrilled to be able to partner with the best in the industry, integrating their solution into our ecosystem to create a frictionless, seamless user experience for the advisory community.”

### **ABOUT REDI2 TECHNOLOGIES, INC.**

Headquartered in Boston, Redi2 Technologies offers a comprehensive, SaaS revenue management platform to the global financial services industry, serving investment management firms with aggregated assets under management of more than \$5.5 trillion. Since its 2002 founding, Redi2

has leveraged technology to automate client reporting, fee billing and invoicing for wealth and investment managers. Redi2 is a Software as a Service (SaaS) pioneer and a market leader in vendor-hosted fee billing for firms of all sizes. For more information, visit [www.redi2.com](http://www.redi2.com).

## **ABOUT FOLIODYNAMIX**

FolioDynamix is leading the evolution of the wealth management experience, with an end-to-end technology solution paired with a suite of advisory tools including model portfolios, research, and overlay management services. Through its powerful technology platform, advisors can manage the entire client lifecycle from proposal generation to account opening to account management (trading and rebalancing) to reporting, all through a sophisticated but easy-to-use cloud-based solution. FolioDynamix is an Actua company (Nasdaq: ACTA). Visit [www.foliodynamix.com](http://www.foliodynamix.com).

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