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our unique investment data aggregation and integration with investlink
automates the process of creating a complete 360 degree view of your client s
wealth run consolidated financial reports

nov 3 2025 consolidated reporting transforms raw data from disparate sources
into a unified actionable view empowering wealth managers and family office
leaders to make informed

agillink is purpose built for business managers family offices and sports
professional firms allowing you to scale your client accounting service while
having the proper controls in place

sep 30 2025 consolidated reporting represents a fundamental transformation in
how wealth managers communicate with and serve hnw clients enabling deeper
relationships through

apr 23 2025 the purpose is not operational efficiency alone but strategic
visibility with wealth fragmented across institutions and jurisdictions consolidated
reporting gives investors and

as an integrated extension of your team our custom tailored wealth aggregation
and reporting service produces consolidated reports of your clients total wealth

regardless of the type of

agillink s investlink platform aggregates and integrates data from over 300 custodians along with general ledger data to provide timely and consolidated reports

consolidated reporting is a much sought after capability among wealth managers yet for many firms big barriers remain in the way of achieving it in practice according to the latest

4 days ago ever wondered why month end consolidation drags on for weeks for finance teams managing multiple entities manual consolidation often takes over 15 business days spent

the agillink partnership with risclarity maximizes the capabilities of wealth managers when it comes to clear financial reporting and account integration

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