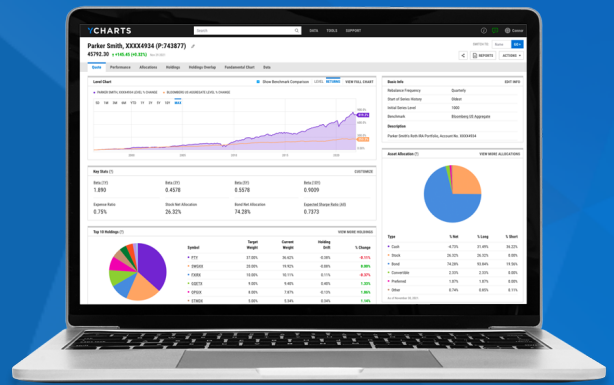


Addepar + YCHARTS



Enabling smarter investment decisions & better client communications for advisors

As advisors and planners seek to differentiate themselves and effectively communicate their value proposition, creating repeatable, scalable processes for AUM growth can be a challenge. YCharts delivers by streamlining and automating investment research, creating compelling presentation materials, and helping advisors achieve more growth in less time.

Who is YCharts?

Thousands of financial advisors, planners and asset managers rely on YCharts to develop insights, build and manage portfolios, and effectively communicate with prospects and clients. With industry-leading tools, you're empowered to create compelling visuals that emphasize the strengths of your investment strategies and grow your assets under management.

→ [Learn how YCharts can help you](#)

Getting Started

Are you ready to optimize your portfolio construction & analysis, streamline reporting workflows, and help your clients achieve their goals?

 [Getting Started Video](#)

 [Questions?
support@ycharts.com](mailto:support@ycharts.com)

 [Learn How to Set Up
This Integration](#)

[Schedule a Demo](#)

[Start a Free Trial](#)

How Addepar + YCharts Work Together

By combining YCharts' visualization tools and comprehensive data coverage with information housed in Addepar, you can now:

- Easily import portfolio holdings and weights from Addepar to YCharts
- Create visually compelling portfolio reports and comparisons to support asset gathering
- Analyze model and client portfolios' performance, risk, asset allocations, security-level holdings, and more
- Compare your client and model portfolios to any security, portfolio, index, hypothetical strategy, or custom benchmark on YCharts
- Streamline the creation and sharing of reports, plus other communication and prospecting materials, across your team