

Fulcrum Point Financial Partners with BondWave for Serviced Bond Solution

Solution enables advisors to more easily offer customized bond portfolios

Charlotte, NC & Wheaton, IL (January 25th, 2017) – Fulcrum Point Financial, a provider of full service fixed income support for independent registered investment advisors, broker/dealers and institutions, and BondWave LLC, a leading financial technology firm focused on fixed income solutions, announced today the launch of Fulcrum’s Serviced Bond Solution. The new program simplifies bond investing for advisors by providing the construction, trading and continuous monitoring and oversight of individual bond portfolios. BondWave will provide key technology components enabling this service. The result is an experience that offers simplified access to individual bonds through sophisticated, customized client portfolios.

The Serviced Bond Solution enables advisors to provide their clients with custom bond portfolios that are taxable or tax exempt, by structure (ladder, barbell, custom), include or restrict specific bond types, include investment committee rules and include account specific rules. The solution also features comprehensive portfolio monitoring for pending calls or maturing bonds, downgrades, credit watch, material events, portfolio drift, changes in account holding values, investment policies, compliance guidelines and report scheduling.

The BondWave technology platform is the engine behind the Serviced Bond Solution, providing connectivity to custodians, overnight monitoring, automated reporting and access to the trading desk.

“Particularly in an environment of rising rates, investors are seeking to diversify and optimize their bond holdings, yet many advisors unnecessarily offer clients a limited range of investment options because of the complexity of fixed income investing,” said Michael Gregson, founder and CEO of Fulcrum Point Financial. “Fulcrum’s Serviced Bond Solution is designed to simplify bond investing making it easy for advisors to create, monitor and continuously manage custom bond portfolios.”

“A combination of events from regulations to investor demand for transparency and better analytics and intelligence are driving improvements to the application of technology and the evolving market structure for fixed income,” said Michael Ruvo, CEO of BondWave. “Fulcrum Point Financial’s Serviced Bond Solution is a significant leap forward that is moving bond investing closer to the goal of providing advisors with the same investing experience as has been standard in the equity markets for decades.”

For more information please contact: Michael Gregson at 980-272-3777 or info@fulcrumpointfinancial.com

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Fulcrum Point Financial

With offices in Charlotte, and McLean, VA, Fulcrum Point has experienced staff to meet all your fixed income needs. We only offer fixed income securities (including structured products). By focusing on fixed income markets exclusively, our trading and sales professionals offer the deepest and most up-to-the-minute view of the bond market. We specialize in the development of deep partnerships across the industry to bring the best in fixed income investing directly to your business. Leverage our experience to help you achieve the results you desire.

BondWave LLC (BondWave®)

BondWave is a financial technology company specializing in fixed income solutions. We serve a wide range of customers, from small independent RIAs to some of the largest broker-dealers and custody providers in the financial services industry. Traders and advisors use our tools to provide a superior fixed income experience to their clients. By creating sophisticated, yet simple solutions for all stakeholders in the investment process, we help traders and advisors better leverage individual bonds as they work to achieve the investment objectives of their clients. Our tools enable strategy-based investing - including portfolio creation, monitoring and rebalancing - while greatly enhancing the communications between the trading desk, advisors and their clients. BondWave is liquidity and trade agnostic and our sole focus is to provide a simple, sophisticated user experience around individual bond investing. Additional information is available at www.bondwave.com.



For more information, please visit:
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