



Integration overview

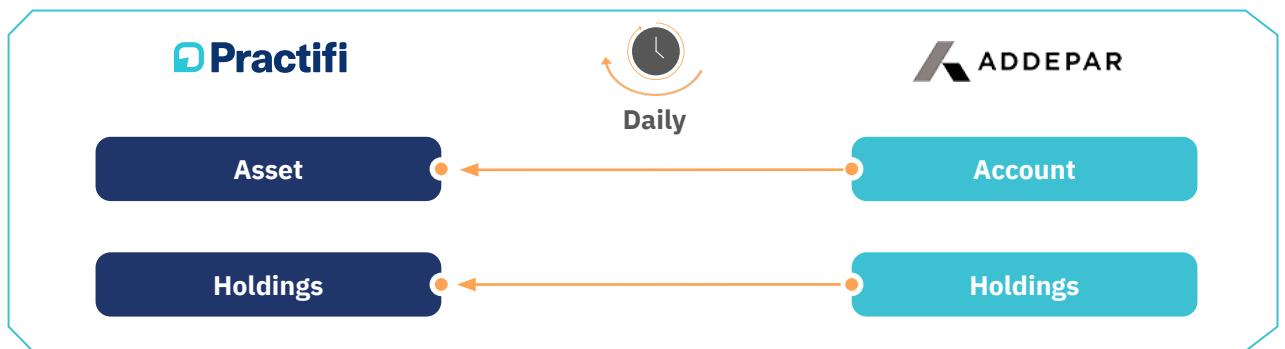
Practifi and Addepar have joined forces to make sure you always have the most up-to-date information on your clients’ financial health. With one simple click you’ll be able to dive into the status of each of your client’s assets and holdings within Practifi, ensuring they’re on track to achieve their goals.

You can find additional information in our Knowledge Base [here](#) by searching for “Addepar Integration”. Alternatively, reach out to your Client Success Manager or [contact us](#) to learn more.

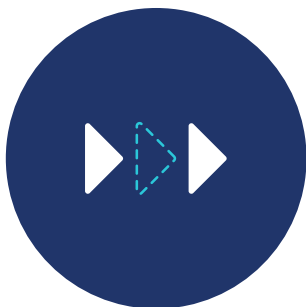


Data mapping & syncing

From the Addepar Portfolio page on the client record in Practifi, you can link that client with an Addepar Entity. Once linked, the information flow between the two systems functions as below. Your clients’ Account and Holdings data in Addepar will sync one-way every day with Practifi’s Asset and Holdings.

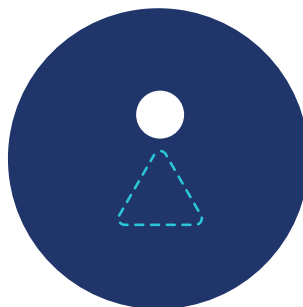


Benefits for you



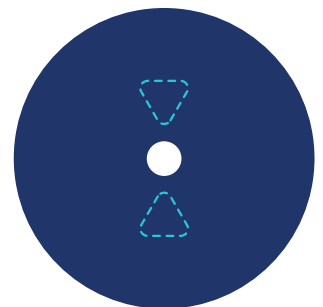
Efficiency

Reduce error and eliminate the task of manually updating asset and holding balances between systems.



Strategy

Free up your time and use it to grow your client relationships and improve investment strategies.



Unified View

Unify the client record within Practifi and view all of your clients’ portfolio positions at a glance.

