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Turnkey asset management platform SEI Investments is shaking up the executive leadership of its independent advisory business as it pushes

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past its TAMP origins to offer
more services to RIAs. Five ...

**SEI reorganizes its
Independent Advisor
Solutions team to better
serve financial advisors**

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Solutions, a leading provider of client relationship management ("CRM"), AML compliance and fraud ...

Vitesse Selects Alessa by Tier1 Financial Solutions to Enable Secure Real-Time

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Global Transactions

To better help financial advisors and wealth management clients accelerate growth, Broadridge Financial Solutions (NYSE: BR), a global Fintech leader, and TIFIN, today announced that Broadridge will ...

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**Broadridge to Distribute
TIFIN's Suite of Wealth
Management Solutions,
Accelerating Growth for
Financial Advisors**

Proactive Worldwide, Inc. (PWW),
a leading competitive intelligence

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company, announces Karen
McLaughlin as Vice President,
Financial Services Practice.

McLaughlin comes to PWW from
multinational ...

**Proactive Worldwide Hires
Experienced Leader to Drive**

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**and Manage its Financial
Services Practice**

Global leadership advisory and executive search firm Sheffield Haworth has named Tom Arnall as a director within the financial services practice in London. He joins the firm to further develop

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**Sheffield Haworth Appoints
Leader for Retail and
Consumer Financial Services
Practice**

At the end of the first quarter of
2021, UBS's Americas wealth

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management ... financial lives
through three strategies.

Adoption of Wealth Way by
households with more than \$1
million of assets to ...

**North America's best bank for
wealth management 2021:**

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UBS Theory Practice Solution

BarterPay discusses the opportunity to modernize and legitimize B2B bartering to support cash flow management for small businesses with excess inventory.

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**Pulling B2B Bartering From
Underground And Into A Cash-
Management Strategy**

Kickstand Wealth Advisors, based in Pittsford, N.Y., announces the successful launch of its wealth management practice with the support of TruClarity Wealth

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Advisors' RIA platform. Kickstand
was...

**Kickstand Wealth Advisors
Launches Wealth
Management Practice in
Pittsford, New York**

HighPath Advisors, a boutique

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financial advisory agency, has launched an expanded range of wealth management and financial planning ... the recently enhanced solutions were launched in response to ...

Redwood City CA Wealth

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**Management – Expert
Investment Advice Service
Launched**

Sales Performance Management
Market in Brief Global sales
performance management
market was valued at US 3 061 2
Mn in 2019 and is expected to

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reach US \$12.0274 Mn by 2027
expanding at a CAGR of 18.7 ...

**US Market Size of Sales
Performance Management
Trends And Opportunities
Details Shared In Report 2027**

CSG® (NASDAQ: CSGS), the

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Leader in innovative customer engagement, revenue management and payments solutions that make ordinary customer experiences extraordinary, today announced the acquisition of ...

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**CSG Supercharges Customer
Engagement Solutions with
Acquisition of Kitewheel**

Novo Integrated Sciences, Inc.
(NASDAQ:NVOS) (the “Company”
or “Novo Integrated Sciences”), a
provider of multidisciplinary
primary healthcare, today

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reported financial results for its
fiscal third ...

**Novo Integrated Sciences
Announces Third Quarter
2021 Financial Results**

HealthEdge Investment Partners,
LLC ("HealthEdge"), a healthcare

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focused private equity fund, and Synergistic Capital Partners ("SCP"), an independent sponsor, announced the completion of an ...

HealthEdge Completes Investment in Today's Dental

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**Network, a Premier Dental
Practice Network & Support
Organization**

U.S. Bank announced today that it has entered into a definitive agreement to purchase PFM Asset Management LLC under its subsidiary, U.S. Bancorp Asset

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Management. PFM Asset
Management will continue ...

U.S. Bank Acquires PFM's Asset Management Business

Think Systems Inc., a privately owned national technology and operations advisory firm that

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helps small and mid-market
companies with organizational
solutions and strategic hiring,
announced today ...

**Think Systems Strengthens
Team with Addition of John
Riganati as Sr. Executive**

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**Advisor, Due Diligence
Practice Lead**

--(BUSINESS WIRE)--Healthcare Administrative Partners (HAP), a provider of outsourced billing, coding, and practice management solutions for ... include practice and financial management

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**Commonwealth Radiology
Associates Expands Service
Agreement with Healthcare
Administrative Partners**

CNW Telbec/ - iA Financial Group
has announced the merger,

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effective July 1, 2021, of FundEX Investments Inc. ("FundEX") and Investia Financial Services Inc. ("Investia"). The merger unifies iA Wealth ...

iA Financial Group unifies MFDA wealth management

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division under Investia brand

June 16, 2021 /PRNewswire/ --

ThroughPut Inc, the Industrial AI Supply Chain pioneer, today announced that it has been awarded the "Top 10 Supply Chain Management Solution Companies of 2021" by ...

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**ThroughPut Inc Named A Top
10 Supply Chain Management
Solution Provider 2021 by
Manufacturing Tech Insights**

UBS Private Wealth Management
today announced that Melissa
Corrado-Harrison, a Private

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Wealth Advisor in the firm's
downtown Denver office, has
been named to the Barron's Top

...

**UBS Advisor Melissa Corrado-
Harrison Named to the
Barron's Top 100 Women**

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Financial Advisors List

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