



Welcome to the Spring 2025 edition of **The Update**, brought to you exclusively by RBC Clearing & Custody (RBC C&C). The Update helps you stay current on the latest happenings in the **RBC Marketplace** by highlighting new vendor additions, new preferred pricing arrangements, and updates to existing Marketplace vendor solutions.

In this edition, we are excited to announce four new additions to the RBC Marketplace.

RBC Marketplace Announcements



TaxStatus

TaxStatus provides the most accurate and comprehensive financial picture for any individual, business, or trust through a direct integration with the IRS. With an easy client permission-based process, firms can obtain verified data that includes individual/business/trust tax transcripts, tax insights, income sources, account data with asset and liability activity, business ownership (LLC, S-Corp, partnerships), consolidated accounts, and employment history.

Learn More:

[Better data. Better advice. Better outcomes. — TaxStatus](#)

Vendor Contact Info:



hello@taxstatus.com for inquiries and to schedule a meeting

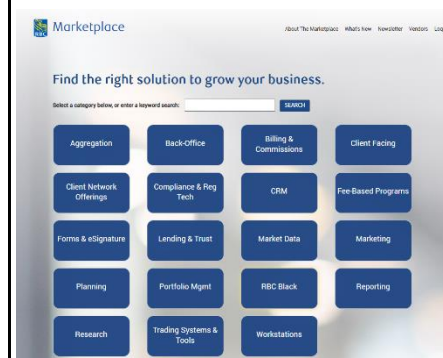


browning@taxstatus.com to contact your liaison, Browning E. Mank, directly

What is RBC Marketplace?

RBC Marketplace brings together all the technology and product solutions from RBC and third-party vendors that you and your financial professionals can use to create your customized offering. Visit our Marketplace website to browse the offerings.

[Visit the RBC Marketplace here](#)



RBC Preferred Discount Available

RBC Clearing & Custody does not provide tax or legal advice.

Exhibit A.

Exhibit A

Exhibit A is a custom-branded charting platform built by the team behind Ritholtz Wealth Management's visual storytelling. Complex market data is simplified into powerful visuals that deepen relationships and build trust. Advisors gain access to a growing library of 100+ charts and 10+ pre-built decks — covering timeless themes like navigating market volatility, avoiding the pitfalls of market timing, embracing long-term investing, and the importance of diversification. Exhibit A provides the ability to upload your firm's logo, colors, headshots, and disclosures with ease allowing each firm to create a consistent theme across all visual insight. All charts and decks update daily.

Learn More:

[Exhibit A - Wealth's Premiere Custom-Branded Charts](#)

Vendor Contact Info:

 contact@exhibitaforadvice.com

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fp alpha α

FP Alpha

FP Alpha is an advanced planning platform built for financial advisors. It reads and analyzes complex documents like tax

Need a Second Opinion?

RBC now offers complimentary technology consulting to help your firm make the most out of your tech investments. Whether its understanding all that RBC has to offer, or optimizing your overall technology stack, we can help.

RBC Technology Consulting can help you navigate and understand the tech tools that RBC C&C has to offer. In addition to being experts on RBC's technology offerings, this team also has deep knowledge of third-party vendor technology solutions based on their experience working with hundreds of fintech vendors and other independent firms, like yours.

Take advantage of this complimentary service by emailing

c&ctechconsulting@rbc.com


returns, wills, and trusts—transforming them into actionable insights in minutes. With powerful tools like Estate Lab, Tax Projector, and Roth Conversion Simulator, FP Alpha helps advisors elevate client conversations, retain and grow AUM, and drive multi-generational planning—all in one platform. What used to take hours, now takes minutes. Winner of the 2024 WealthManagement.com Industry Award for Estate Planning Innovation.

Learn More:

[A Truly Comprehensive Advanced Planning Platform - FP Alpha](#)

Questions:

 sales@fpalpha.com

 212-796-8790

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Flyer Financial Technologies (Flyer FT)

Flyer Financial Technologies (FlyerFT) builds cutting-edge technology that solves wealth management firms' toughest trading workflows. As a leading cloud-based WealthTech provider, FlyerFT serves wealth managers, asset managers, broker-dealers, RIAs, banks, TAMPs and other technology service providers. The platform includes Co-Pilot, a multi-asset portfolio management and trading platform, and the Flyer Trading Network, an order and trade routing network with direct FIX connectivity. Co-Pilot and FTN enable advisors, portfolio managers, and traders the freedom to focus on performance at each stage of the trading lifecycle, from portfolio construction to trade execution. The platform augments rather than replaces the human resulting in more effective trading workflows with less effort.

Tech Help @ RBC

Field Services Group

"How do I" questions?

M-F 8 a.m. – 7 p.m. CT

(800) 949-0242

Technology Services Group

Connectivity questions

M-F 8 a.m. – 8 p.m. CT

(833) 820-3276

Technology Training

Schedule one-on-one training sessions with a technology training consultant in Nexus > Launcher > Support > Book Training

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Learn More:

[Flyer Financial Technologies | Portfolio Management Software Solution](#)

Questions:

 sales@flyerft.com

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