THE UPDATE

Clearing & Custody

Welcome to the Summer 2026 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

slant

Slant CRM | Category: CRM

Slant is the AI-native CRM for financial advisors. Instead of digging through emails, calls, and documents, advisors can ask Slant and get answers instantly. Slant turns CRM from a system of record into a system of action, so advisors can focus on client relationships, not busy work.

Core features of Slant include CRM, AI chat, AI notetaker, workflow automation, data enrichment, project management, and more. Whether prepping for a meeting, following up with a prospect, or staying on top of admin work, Slant keeps everything in one place so advisors can focus on what actually grows their business—stronger client relationships.

Learn More:

https://www.slant.app

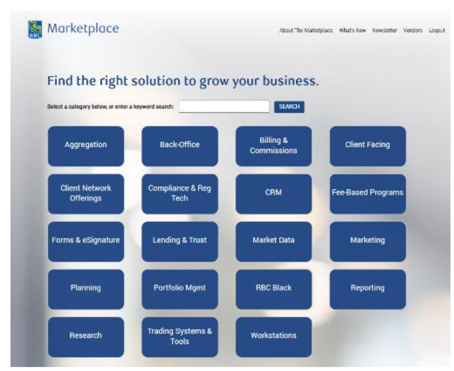
Questions:

hayden@slant.app or (385) 274-1868

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



Greenboard

Greenboard | Category: Compliance

Greenboard is the unified, AI-native compliance system of action that reduces the tedious work of compliance for SEC- and FINRA-regulated firms. It replaces the fragmented mix of legacy tools that most organizations use for employee compliance, electronic communications archiving, marketing reviews, firm compliance calendar, and third-party diligence with one modern, easy-to-use platform that automates more than 80% of compliance administrative work. Greenboard now supports the compliance operations of over 600 financial institutions, including RIAs, private funds, hedge funds, and broker-dealers that collectively manage hundreds of billions of dollars in assets. By centralizing data and workflows, it helps firms reduce regulatory risk, simplify their technology stack, modernize how they run compliance, and save money.

Learn More:

https://greenboard.com/

Questions:

sales@greenboard.com

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

Hadrius | Category: Compliance

Hadrius is the agentic compliance infrastructure for SEC- and FINRA-regulated firms. It helps compliance teams scale without adding operational complexity by executing routine compliance work under human governance. Built on one system of records, Hadrius replaces fragmented compliance systems and the operational burden required to manage them with one audit-ready system of record. It allows teams to spend less time administering compliance and more time exercising judgment.

Learn More:

https://www.hadrius.com

Questions:

sales@hadrius.com

Tech Help @ RBC

Field Support Team
"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

Oyster Compliance | Category: Compliance

Oyster Compliance leverages expert guidance and innovative technology to empower organizations and drive sustainable success. The firm is committed to enhancing business operations, ensuring compliance with evolving regulations, and optimizing strategies for long-term growth.

Oyster Compliance's business-focused team comprises senior compliance consultants and executives who deliver top-tier compliance advisory services tailored to clients' needs—whether on a project, part-time, or ongoing basis. The firm equips clients with the specialized skills and expertise necessary to establish, maintain, and strengthen effective compliance programs. Through a customized approach, Oyster Compliance enables organizations to navigate today's complex regulatory and economic landscape, managing compliance costs efficiently while preserving the essential infrastructure and control environment required for robust governance.

Learn More:

[Compliance | Oyster Consulting]

Questions:

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The Update newsletter is being distributed to firm leaders only. You are receiving this email because your firm currently works with RBC Clearing & Custody, and you have been designated as having a leadership role in firm management, operations, technology or compliance at your firm.

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