



Modern Capital Announces MOCA, its New Technology Platform for Advisors & Clients

CHARLESTON, SOUTH CAROLINA, USA, April 14, 2020 /EINPresswire.com/ -- Modern Capital, a diversified financial services firm, has announced that it is launching MOCA, a bespoke, integrated technology solution to empower its advisors and their clients. As part of its ongoing commitment to modernizing the financial services industry, the company will be rolling out its web-based platform in mid-2020 to the firm's financial advisors, as well as providing clients with both an online portal to access their account information and a mobile application, which is anticipated to be available in the Apple App store and the Google Play store.

"Our goal is to set the pace for innovation by proactively seeking solutions from outside our industry to improve the retail financial services experience for our clients, our advisors, and our shareholders. We continue to raise the bar in an industry which has tended to lag in its customer service technologies," said Brad Atkins, Chief Executive Officer of Modern Capital.

MOCA aims to streamline every part of the financial services transaction lifecycle and provide all information in a unified paperless format. The platform integrates holding and performance reporting, trading and trend analysis. It will also provide client access via web and mobile apps, online account onboarding and will integrate with multiple financial planning applications. Through MOCA, clients and their advisors will be able to see account and position level data, market data, and include accounts that are not held at Modern Capital such as company sponsored retirement accounts or checking and savings accounts.

Modern Capital has been active pursuing a growth and innovation strategy throughout 2020, recently in announcing acquisitions of a mutual fund family as well as a retail broker dealer, and the expansion of its management team. MOCA serves to support the firm's mandate of delivering Modern financial services solutions.

About Modern Capital

Modern Capital is a Charleston, South Carolina based diversified financial services firm which was started with the simple yet audacious goal of improving both the experience and outcome of retail financial clients through an advisor-empowered model. This approach leverages technology and data insights along with a contemporary revisioning of products and services to democratize opportunities for wealth planning and preservation, such as had previously been reserved only for ultra-wealthy individuals and institutional investors. By building innovative investment vehicles and technologies, Modern Capital is guiding its clientele to sustainable wealth.

Learn more at www.moderncap.com.

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