Worldsource Securities to partner with Envestnet

Worldsource Securities Inc. enhances its wealth service offering through partnership with Envestnet

Worldsource Securities Inc. Logo

MARKHAM, ON, CANADA, June 26, 2023 /EINPresswire.com/ -- Worldsource Securities Inc. (WSI) a 5-Star brokerage* today announces a partnership with Envestnet, a leading provider of intelligent systems for wealth management, to provide WSI advisors with access to a unified managed platform that supports Portfolio Managers and Managed Account Programs such as Unified Managed Accounts (UMA).

> We are extremely excited to take the next step in our evolution as a leading Canadian brokerage."
>
> *Rich Rizzi*

"We are extremely excited to take the next step in our evolution as a leading Canadian brokerage. We are now well along the path of building a wealth service offering that provides advisors with their choice of investment solutions along all phases of the wealth continuum" says Richard Rizi, Vice President Investment Services at Worldsource.

Once integrated with the Envestnet platform, WSI will join the select few Canadian brokerages with the infrastructure required to offer a UMA program. The Envestnet platform will also allow WSI Portfolio Managers to integrate their bespoke model portfolios into their client relationships and realize the business efficiencies required to both scale their business and bring value to their high net worth client relationships.

"It is this singular commitment to building a Wealth Service offering that leverages data, digital tools and technology that we believe sets us apart in the Investment Dealer landscape" says Doce Tomic Chairman and CEO, Worldsource, "and our work and commitment to engaging our Advisors in this enterprise will never stop."

Envestnet Head of Institutional Business Development Michael Ferraro added that "The innovative, intuitive technology powering the Envestnet unified managed platform gives

Worldsource a powerful tool with which to drive their business forward and get out in front of a fast-evolving industry."

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About Worldsource Securities Inc.

Founded in 2002 Worldsource Securities Inc. is a full-service investment dealer and a division of Worldsource Group of Companies Inc., operating as Worldsource Wealth Management, a wholly-owned subsidiary of Desjardins Group, North America's largest financial cooperative and provider of financial and insurance solutions

Worldsource Securities Inc. and Envestnet are separate and unaffiliated firms. This release should not be construed as a recommendation or endorsement of any particular product, service, or firm.

*Wealth Professional 2022 5-Star Brokerage Report

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