

inVesti Financial has successfully integrated its record keeping software with American Trust Custody

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NEW YORK, NY, UNITED STATES, April 15, 2024 /EINPresswire.com/ -- inVesti Financial (inVesti), a leading solution provider for the enterprise financial and workforce benefit markets, announced it has successfully integrated its inVesti-RKS (Record Keeping Services) software with American Trust Custody. This integration allows inVesti to employ American Trust Custody technology and services that include custody, trading, and paying agent, and it creates a seamless way for 401(k) and 403(b) plan participants to invest in a multitude of mutual funds and ETFs.

"inVesti is very excited to have partnered with American Trust Custody for this integration. We see partnerships like this as a key component in our strategy to provide a powerful, unified platform addressing the needs of workforce participants," said Tom Hansen, inVesti's Co-Founder and CEO. "Putting stakeholders in concert with one another to produce a superior financial service experience is what drives our growth." inVesti Co-Founder and COO Tony Michael, CRPS, BCF™, added, "The familiarity developed over the years of our longstanding relationship has made it easy to integrate our system with American Trust Custody."

American Trust Custody is a leading financial services organization that provides a wide array of custody and trust services to a diverse national client base of financial advisors and institutions, asset managers, and benefits administrators. For almost 50 years, the businesses that comprise AmericanTCS— American Trust Custody, American Trust Retirement, American Trust Wealth, American Technology Automation, and AmericanTCS Fiduciary Services – have been collaborating with financial intermediaries to provide successful financial outcomes for them and their clients. AmericanTCS is dedicated to delivering exceptional customer service and innovative technology to create operational efficiencies and competitive advantages. By prioritizing strong relationships and continuous collaboration, AmericanTCS aims to establish itself as the go-to services partner in today's ever-evolving marketplace, fulfilling its mission of creating financial security for all Americans.□

The inVesti-RKS system is an open architecture, multi-vendor, cloud hosted financial software platform created to deliver dynamic retirement and workforce benefit solutions. The platform's forward-facing APIs and web services technology is built to remove the static of plan setup,

enrollment, and regulatory management. The RKS along with the rules-based notification delivery platform combine to make up the foundation of the company's integrated products and services.

Tom Hansen
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