

# SoftPak Financial Systems to Launch Urebal Hub at Wealth Management Edge 2025

*Live Demos and Meetings at Kiosk K80 for Portfolio Management Innovation*

BOSTON, MA, UNITED STATES, June 3, 2025 /EINPresswire.com/ -- SoftPak Financial Systems, a leading provider of portfolio management software for

investment firms and RIAs, will unveil its next-generation Urebal Hub platform at Wealth Management Edge 2025 in Boca Raton, FL taking place June 10-12, 2025. This premier industry event brings together registered investment advisors (RIAs), independent broker-dealers, and wealth management leaders seeking cutting-edge fintech solutions.

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*Naaz Scheik*

Urebal Hub is designed to help wealth management firms modernize their tech stack, grow their business and service their clients with streamlined automated workflows. The platform integrates tax-efficient rebalancing, proposal generation, client billing, performance analytics, flexible trading to any custodian, document vault, and CRM workflows—all in one easy-to-use platform built for advisors.

Live Demos and Expert Insights at Kiosk K80

SoftPak’s team, including Christopher Stewart, Director of Client Relations, and Naaz Scheik, CEO, will be at Kiosk K80 to provide live demos and share how Urebal Hub transforms portfolio management for RIAs and investment professionals.

“There really is no other product like Urebal Hub on the market,” said Naaz Scheik. “It consolidates everything RIAs need to grow — powerful portfolio rebalancing, a modern client experience, and tools to help attract new clients to their business — all in a single, easy to use platform.”

Key Features of Urebal Hub

Advisors and wealth managers attending the conference will discover how Urebal Hub sets itself



**UREBALHUB**  
YOUR COMPREHENSIVE RIA TOOLKIT  
New Comprehensive RIA Toolkit from SoftPak  
Financial Systems

apart from traditional solutions:

- **Award-Winning Rebalancer:** Delivering tax-aware, model-driven rebalancing with built-in trade rationale that's both powerful and transparent.
- **Advanced Tax Intelligence Engine:** Handles lot-level controls, wash sale prevention, gain/loss preference, and household-aware tax strategies.
- **Built in Proposal Generator:** Allows users to create personalized proposals with account-level details, risk profiles, and asset allocation strategies.
- **Integrated Billing:** Automate complex, tiered billing processes with ease and accuracy.
- **Household Account Management:** Streamline portfolio oversight across multiple accounts while respecting individual preferences and constraints.
- **Unified Platform:** Manage proposals, rebalancing, trading, billing, reporting, and CRM in a single, intuitive interface.
- **Flexible Custodian Trading:** Connect seamlessly with major custodians like Fidelity, Schwab, Pershing, and Interactive Brokers among others.
- **Designed with RIAs, for RIAs:** Created in collaboration with advisors to ensure workflows match real-world needs.



Visit [softpak.com](https://softpak.com) for More Information or to Book a Demo

Advisors and wealth managers can stop by Kiosk K80 for personalized walkthroughs of Urebal Hub or visit [softpak.com](https://softpak.com) to learn more and schedule a demo. This is the perfect opportunity to see how SoftPak's portfolio management software can help your firm scale smarter.

### About Urebal Hub

Urebal Hub is a next-generation portfolio management platform designed for modern RIAs and investment firms. It offers tax-efficient, model-based rebalancing with built-in trade rationale. The platform also includes advanced proposal generation, client billing automation, household account management, performance analytics, and CRM features. Developed in close collaboration with RIAs, Urebal Hub delivers an intuitive, unified experience—empowering advisors to achieve operational excellence and client-focused growth without the complexity of traditional platforms.

### About SoftPak Financial Systems

For over 30 years, SoftPak Financial Systems has been a trusted partner to the world's largest investment firms and RIAs, delivering powerful fintech solutions for portfolio rebalancing,

performance analytics, trading automation, and wealth management. SoftPak's innovative technology is used by global financial institutions to drive growth, compliance, and client satisfaction.

Christopher Stewart  
Softpak Financial Systems

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