Foreside launches Connect+ client portal

February 11, 2021

PORTLAND, Maine – February 11, 2021 – Foreside Financial Group, LLC ("Foreside"), a provider of governance, risk management, and compliance service and technology offerings to clients in the global asset and wealth management industry, today announced that it has launched Connect+™, a newly redesigned and upgraded version of its client portal.

Connect+ brings together a comprehensive suite of technology solutions that pair with Foreside's customized advisory services to improve the compliance function in vital areas such as personal account monitoring, workflow management, best execution review, delivery of education and training to staff, advertising and marketing review, cybersecurity, and ETF AP order management. Select solutions within Connect+ are capable of integrating with an advisor's current portfolio management platform.

"We are excited to be able to enhance our clients' experience with improved access through a single portal bringing together all of the solutions needed to integrate back office systems, increase efficiency, and ultimately streamline compliance, making it more cost effective," said David Whitaker, President at Foreside. "This new platform will make it easier for Foreside clients to take advantage of our full array of technology solutions, while maintaining the high-touch approach that is the hallmark of our service and platform-based model."

"Foreside is dedicated to delivering innovative services that not only meet current requirements but also anticipate emerging regulatory and marketplace developments," said Sunil Panikkath, Chief Technology Officer at Foreside. "The responsive and streamlined design of Connect+ delivers an enhanced user experience for our clients, making the portal more intuitive and easy-to-navigate to accomplish business-critical tasks and access information."

The proprietary technology solutions accessible through Connect+ include:

- **Foreside AdCompliance®** – marketing material review for advisor and broker-dealer compliance requirements
- **ForesideConnect®** – workflow management system for compliance consulting clients

- **ForesideXchange**® – ETF AP order management system

Connect+ also brings together additional partner technology applications including Cybersecurity, as well as a collection of services under the umbrella of **ForesideXtend** including solutions for:

- Personal Account Monitoring
- Compliance and Education Courses
- Best Execution

About Foreside Financial Group

Foreside delivers comprehensive advice and best-in-class technology solutions to clients in the global asset and wealth management industries. Foreside distributes more than $1 trillion* of product through their 17 limited purpose broker-dealers. For 15 years, Foreside’s suite of services and platform-based model have helped automate and simplify compliance and marketing for clients. Foreside works with pooled investment products, investment advisors, broker-dealers, global asset managers and other financial institutions.

By harnessing state-of-the-art technology, Foreside helps firms address and shape today’s regulatory environment, drive operational efficiency and growth, and focus on value-adding work. Foreside is headquartered in Portland, Maine, with numerous regional offices, including New York and Boston. For more information on Foreside’s suite of services, please visit www.foreside.com.

*as of 1/1/2021

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