Technology to help drive your growth

Quarterly Update & Roadmap | Q3 - 2026

Clearing

Fidelity INVESTMENTS

For investment professional use only.

Powering Growth Through Technology

Helping you

Grow faster.

Grow smarter.

Grow further.

We're committed to enhancing our technology to help you drive efficiency, leverage data and insights, and scale to meet the evolving needs of your clients

Our approach



Optimize
Creating seamless, data-driven digital experiences to improve efficiency, effectiveness, personalization



Integrate
Enabling robust integrations to help empower unique and impactful technology experiences



Futurize
Enhancing and updating our core technology stack with a focus on the future and keeping stability, scale and security top of mind

Executive Summary

CLEARING – Q3 2026

Faster

- **Account Onboarding:** Faster account opening through CRM and Envestnet integrations, prefill capabilities, and expanded onboarding features.
- **Trading:** Enhanced compliance and market data capabilities.

Smarter

- **Digital Service:** Expanded self-service capabilities, streamlined onboarding, and improved client communications.
- **Wealthscape℠ Intelligence:** Identifies paper check users to drive electronic payment adoption.
- **Data Collaboration:** Faster access to tax lot data and modernized data-sharing capabilities.

Further

- **Integration Xchange:** Expanded APIs, workflow automation, enhanced visibility, and stronger security.
- **Security:** MFA-enabled login experience for stronger protection.
- **S2S Alerts:** Real-time event streams supporting automation and connectivity.

Key Milestones



Wealthscape℠ Account Onboarding

Successfully delivered Wealthscape Account Onboarding's three priority integrations, CRM Prefill, BPM, and Envestnet, streamlining workflows and enhancing advisor productivity through a more connected experience.



Service Alerts

Expanded integration capabilities with secure server-to-server event streaming and Service Center alerts, enabling firms to receive real-time notifications and build customized, automated workflows within their own platforms.



Alternative Investments

Enhanced the Alternative Investments experience by introducing an AI-powered order ticket for document validation, launching the new Alternative Investments Hub in Wealthscape, and streamlining processes through updated forms and agreements.

Notable Roadmap Items

NOW LIVE – Q3

- **Account Onboarding:** CRM, BPM & Envestnet integrations, Multi-Source Prefill, Omnibus account support
- **Alternative Investments**: Hub, AI embedded Order Ticket & Forms enhancements
- **APIs:** Wire Payments & Standing Instructions, Service Center - Search & Status
- **Data:** Full Daily Open Tax Lot Transmissions
- **Digital Security:** Platform Login & Authentication
- **Digital Service:** Service Center – APIs for Search & Status, External Alerts, Chat Assistant - Notifications, BPM - Onboarding Integration
- **Intelligence:** Paper Check Reduction
- **Operations:**– Investor ID Management Pilot, Operations Workstation Pilot
- **Reporting:** Portfolio Margin Fund Detail and CIP/BOIV (216C) reports
- **Trading:** Compliance Rule Management – View Rule GA and Market Data redesign

UPCOMING - Q4

- **APIs:** Account Onboarding - Disclosure Delivery, Digital Service - Status Details & Work Item Updates, Intelligence: Insights
- **Click-to-Agree:** White-labeled experience
- **Data**: Expand ICP Transmission Data Elements
- **Digital Security**: Platform Login: Wealthscape Investor Customer Directed Data Access
- **Digital Service:** Service Center – APIs for Status Details + Work Item Updates
- **Intelligence**: Export Insights, API for Insights
- **Money Movement:** Payment Hub: Wealthscape Investor - General Availability
- **Performance Measurement**: Experience Update: Filters & Selections
- **Platform Experience:** Wealthscape Accounts & Clients Search experience and Wealthscape/Wealthscape Investor Mobile CA Digital Age Assurance Act
- **Trading:** Market Data: Morningstar Product Migration, Wealthscape Mobile - Equity/ETF order entry

 Rollout schedule subject to change. For investment professional use only.

Detailed Roadmap

For investment professional use only.

Technology Roadmap

		Q3 2026	Q4 2026	Q1 2027	Q2 2027	Q3 2027	Q4 2027
Grow Faster	Platform Experience		• Wealthscape Accounts & Clients Search experience • Wealthscape/Wealthscape Inv Mobile: CA Digital Age Assurance Act	• Open Positions: Client Holdings	• Account Profile Platform API • Wealthscape Advanced Account Search		• Account History Platform API • Wealthscape Account Profile -
	Trading	• Compliance & Controls: New Rule Management – View Rule experience • Wealthscape Market Data redesign	• Market Data: Morningstar product migration • Wealthscape Mobile: Equity/ETF order entry	• New Block Order ticket – Equity and Single Leg options - Pilot • New Equity Order Ticket • New Mutual Fund ticket	• New Block Order ticket – Equity and Single Leg Options • Wealthscape Mobile: Mutual Fund order entry	• Wealthscape Investor Mobile: Mutual Fund order entry	• Wealthscape & Wealthscape Investor Mobile: Display Trade Confirms
	Account Onboarding	• Expanded Account Type Support – Omnibus • Top 3 Integrations: CRM, BPM & Envestnet • Configurability of AMA • Support Commission Schedule Codes	• Expanded CRM Prefill Capabilities	• Bundle-Level Reusable Person & Entity Records • Prefill an Existing Account & Features • Document Configurability, Storage and Auto Inclusion • Expanded Account Type Support - Retirement Plan Sponsor & *Foreign* • Support for Power of Attorney	• Account Lookup & Prefill • Data and Documents Transmission • Digitally Support Firms' Custom Forms & Content • Hexure FireLight Annuity Integration • Link Accounts (Standing Instructions) • Copy Draft Accounts as Templates	• Multi-Source Prefill • Alternative Investment Onboarding Addendum • Enhanced Click-to-Agree Data Editing • Fund New Accounts via Journal Transfer • Digital Principal Approval • Forms-Based Account Onboarding • Clone an Existing Account • Duplicate Materials for an Interested Party	• Bulk Account Onboarding • Expanded Account Type Support – Roth for Minor
	Click-to-Agree		• White-labeled experience		• In-person digital authorization	• Streamline Click-to-Agree Experience	
	Money Movement		• *Payment Hub: Wealthscape Investor - General Availability*		• *Payment Hub: Wealthscape - Pilot* • Wealthscape Investor Mobile: Money Movement (EFT & JNL)		
	Alternative Investments	• AI-embedded Alternative Investments Order Ticket • Alternative Investments Hub • Alternative Investments Form Revisions					
Grow Smarter	Digital Service	• BPM: Integration with Wealthscape Account Onboarding • Chat Assistant: Notifications with visual and audio • Service Center: APIs - Search & Status, External Alerts	• Service Center: APIs - Status Details + Work Item Updates				
	Intelligence	• Paper Check Reduction	• API: Insights • Export Insights	• Operations Scorecard			
	Reporting	• New Vendor CIP and BOIV Report - 216 C Report • Portfolio Margin Fund Detail Report		• Supplemental Household Summary Report			
	Data Solutions	• Full daily open tax lot transmissions	• Expand ICP Transmission Data Elements		• Full Daily Closed Tax Lot Transmissions Available	• Full Daily Open Tax Lot Transmissions Available For Approved Fintech Providers	
	Operations	• Investor ID Management Pilot • Operations Workstation Pilot	• External Alerts - OAuth Gateway		• Operations Workstation Generally Available – Wave 1	• Operations Workstation Generally Available – Wave 2	
	Performance Measurement		• Experience Update: Filters & Selections				
Grow Further	Integrations	• Platform Security - Login & Authentication		• API Sample Generator			
	APIs	• Digital Service: Service Center Search & Status • Money Movement: Wire Payment Transaction & Standing Instructions • Trading: Periodic Investment Plan	• Account Onboarding: Disclosure Delivery • Digital Service: Status Details & Work Item Updates • Intelligence: Insights	• Account Onboarding: Account Management, Transactions Bundler, Documents • Reporting: Supplemental Household Summary Report	• Account Onboarding: Standing Instructions Composite, Journal Funding Transact • Account Onboarding: Disclosure Delivery	• Platform Experience: Account History & Account Profile	
	Digital Security		• Platform Login: Wealthscape Investor - Customer Directed Data Access		• Platform Login: Multi Factor Authentication - Time based one-time PIN		

Items shown in italics indicate updates or changes made since the previously published roadmap. Rollout schedule subject to change. For investment professional use only.

Technology Update

For investment professional use only.

Grow Faster

Simplify account onboarding with digital workflows and client authorization, intuitive experiences and integrated funding capabilities for a frictionless experience that enables faster execution



Quickly Open & Fund Accounts

Simplify onboarding with a fully digital workflow for seamless processing



Intuitive Experiences

Complete your most frequent tasks faster and with less friction



Digital Delivery

Provide a more streamlined experience to your clients

Solution Spotlight

- Account Onboarding Enhancements leverage CRM and Envestnet integrations to enable intelligent multi-source data prefill, reduce manual entry, simplify setup, and expand onboarding capabilities with Omnibus accounts, creating a faster and more seamless onboarding experience.
- Trading Updates enhance compliance and market data experiences through a redesigned Rule Management interface and Wealthscape℠ Market Data enhancements, helping advisors make more informed decisions with greater efficiency.

What does it mean to grow faster?

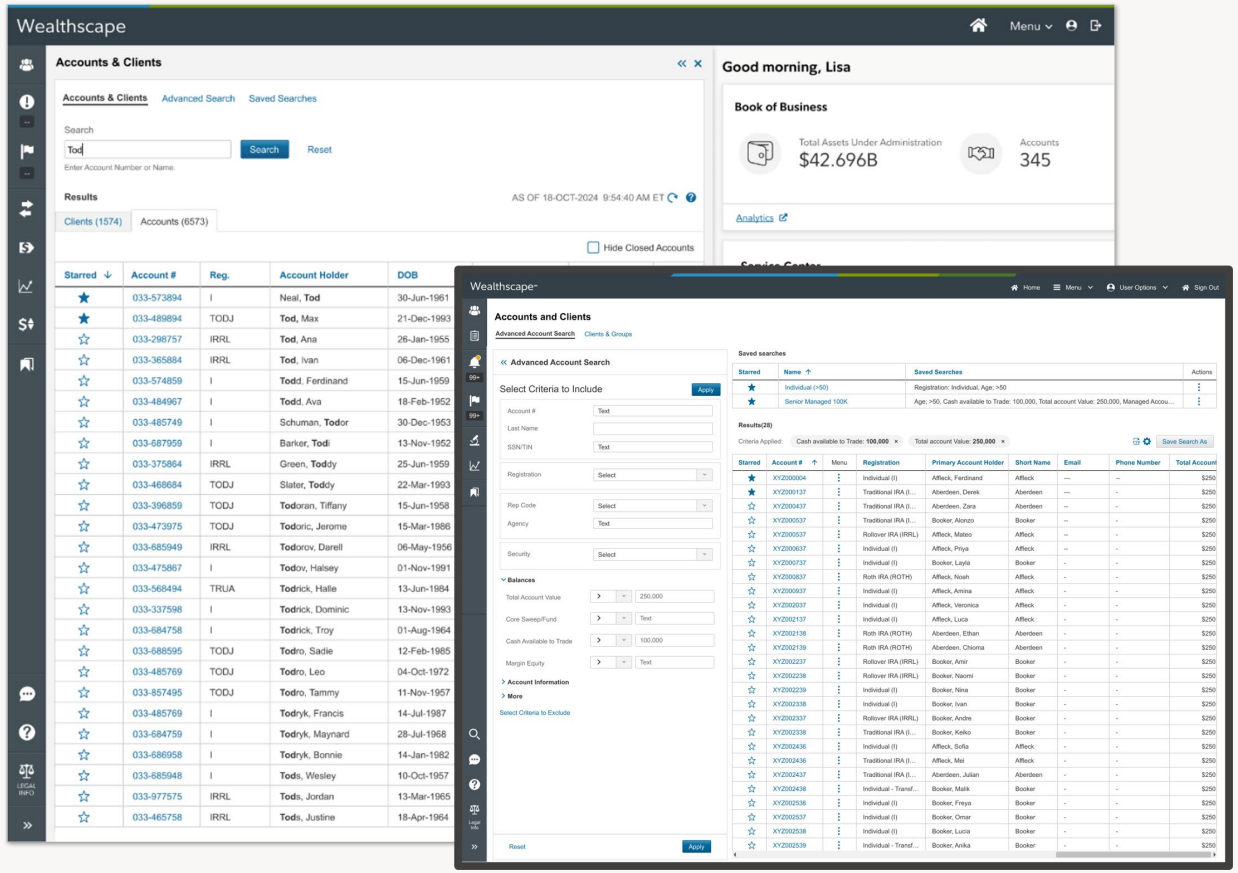
- Technology that streamlines work and straight through processing, allowing your teams to focus on client needs, not NIGOs.
- Digital workflows that speed up client service and drive deeper satisfaction.
- Self-service tools that make it easy for your clients to move money and engage with your teams, saving time.

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Platform Experience

Creating simpler, smarter digital experiences across investor and advisor journeys.



Highlights

The digital experience continues to evolve with enhancements that make key advisor and investor activities more accessible, intuitive, and efficient. Recent investments include the launch of mobile Equity and ETF trading in Wealthscape℠, alongside continued progress toward a unified experience for portfolio insights, account management, and search capabilities. Together, these enhancements are designed to improve productivity, provide greater flexibility across devices, and support a more seamless end-to-end experience as the platform continues to modernize.

Now Live 2026

Q2

- Account Profile: Wealthscape Investor

Upcoming 2026

Q4

- Wealthscape Accounts & Clients Search experience
- Wealthscape Mobile: Equity/ETF order entry
- Wealthscape/Wealthscape Investor Mobile: CA Digital Age Assurance Act

Upcoming 2027

Q1

- Open Positions: Client Holdings
- Wealthscape Mobile: Mutual Fund order entry

Q2

- Account Profile Platform API
- Wealthscape Advanced Account Search
- Wealthscape Investor Mobile: Money Movement (EFT)

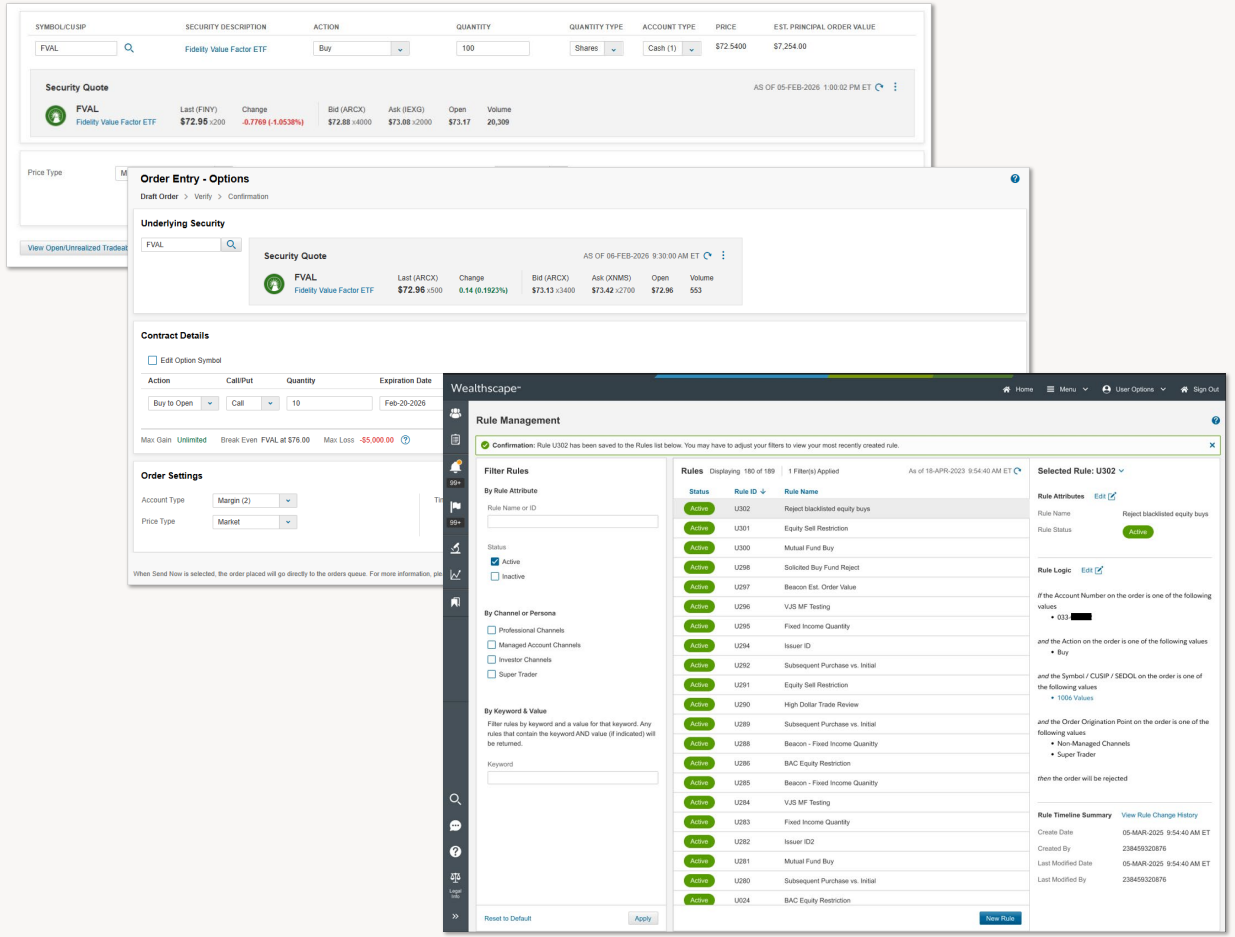
Q4

- Account History Platform API
- Wealthscape Account Profile

 Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Trading Experience

Enhancing trading workflows, strengthening compliance controls, and supporting international market requirements through a more streamlined user experience.



Highlights

In Q3, clients will benefit from key usability enhancements across the trading experience, including the launch of a redesigned Compliance & Controls Rule Management interface that makes rule discovery and interpretation easier through plain-language rule logic and advanced filtering capabilities. In addition, the Wealthscape[SM] Market Data experience will be refreshed with a modernized design, helping deliver a more intuitive and efficient workflow for users accessing market information.

Now Live 2026

Q2

- International Market changes: Israel , South Korea
- Wealthscape Investor: New Equity Order ticket & New Mutual Fund Order ticket

Q3

- Compliance & Controls: New Rule Management – View Rule experience
- Wealthscape Market Data redesign

Upcoming 2026

Q4

- Market Data: Morningstar product migration
- Wealthscape Mobile: Equity/ETF order entry

Upcoming 2027

Q1

- New Block Order ticket – Equity and Single Leg options – Pilot
- New Mutual Fund ticket
- New Equity Order Ticket
- Wealthscape Mobile: Mutual Fund order entry

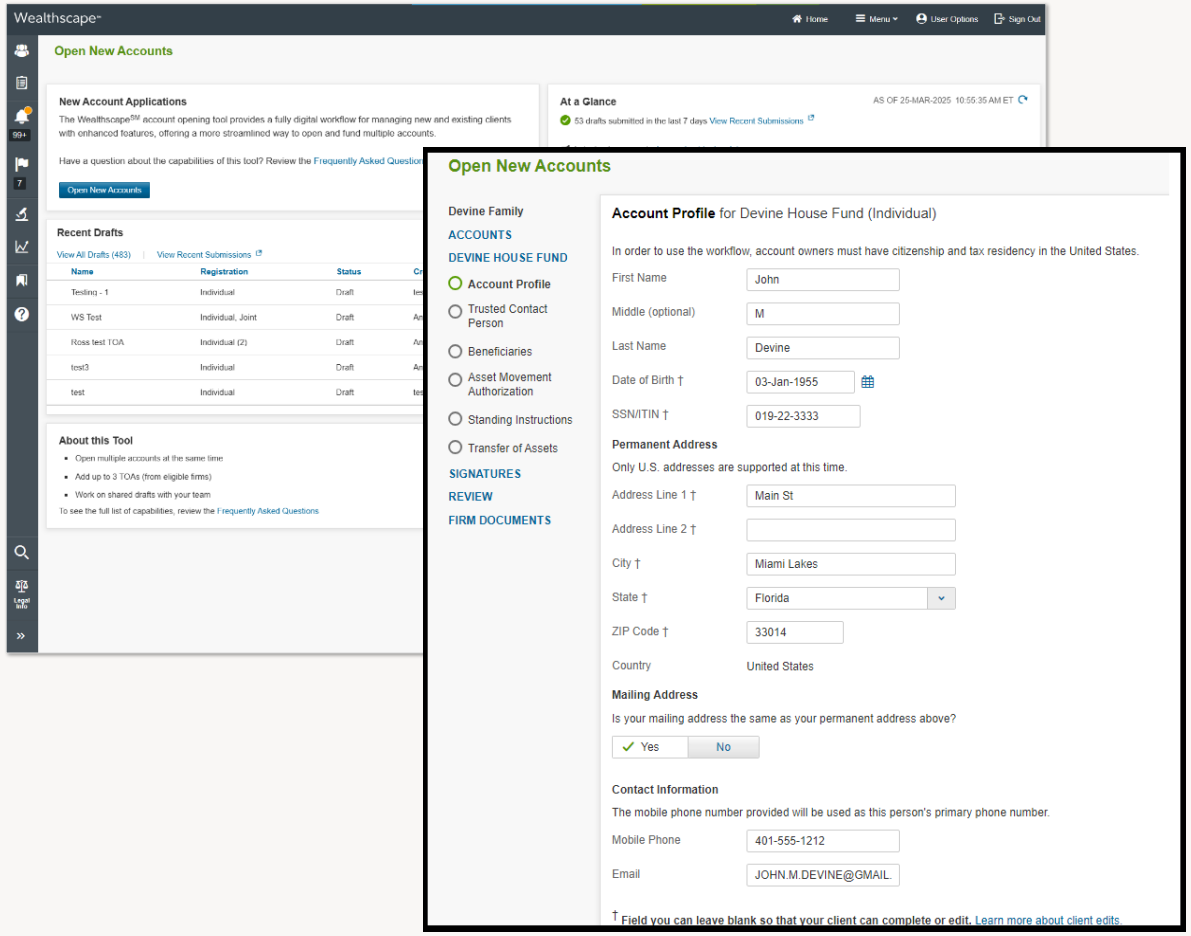
Q2

- New Block Order ticket – Equity and Single Leg Options

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Account Onboarding

Streamlining account onboarding through broader account support, workflow integrations, and improved onboarding efficiency across the advisor experience.



Highlights

This quarter's focus is on making digital account onboarding more connected and efficient by expanding support for additional account types and delivering key integrations with CRM platforms, BPM workflows, and Envestnet. These enhancements are designed to reduce manual data entry, improve workflow efficiency, and help firms create a more seamless onboarding experience for advisors and investors. Together, these investments reinforce the move toward a more integrated, scalable, and digitally enabled account opening process that aligns with how firms want to operate today and in the future.

Now Live 2026

Q2

- Expanded Account Type Support – Layered
- Margin & Options Account Enablement

Q3

- Expanded Account Type Support – Omnibus
- Multi-Source Prefiill
- Top 3 Integrations: CRM, BPM & Envestnet

Upcoming 2026

Q4

- APIs: Disclosure Delivery

Upcoming 2027

Q1

- Account Lookup & Prefill
- APIs: Account Management, Transactions Bundler, Documents
- Books & Records Transmission
- Bundle-Level Reusable Person & Entity Records
- Copy an Existing Account
- Document Configurability, Storage and Auto Inclusion
- Expanded Account Type Support - Retirement Plan Sponsor & Foreign
- Support for Power of Attorney

Q2

- Custom Forms & Content Support
- Digital Principal Approval
- Formless Firm Enablement
- Hexure FireLight Annuity Integration
- Link Accounts (Standing Instructions)

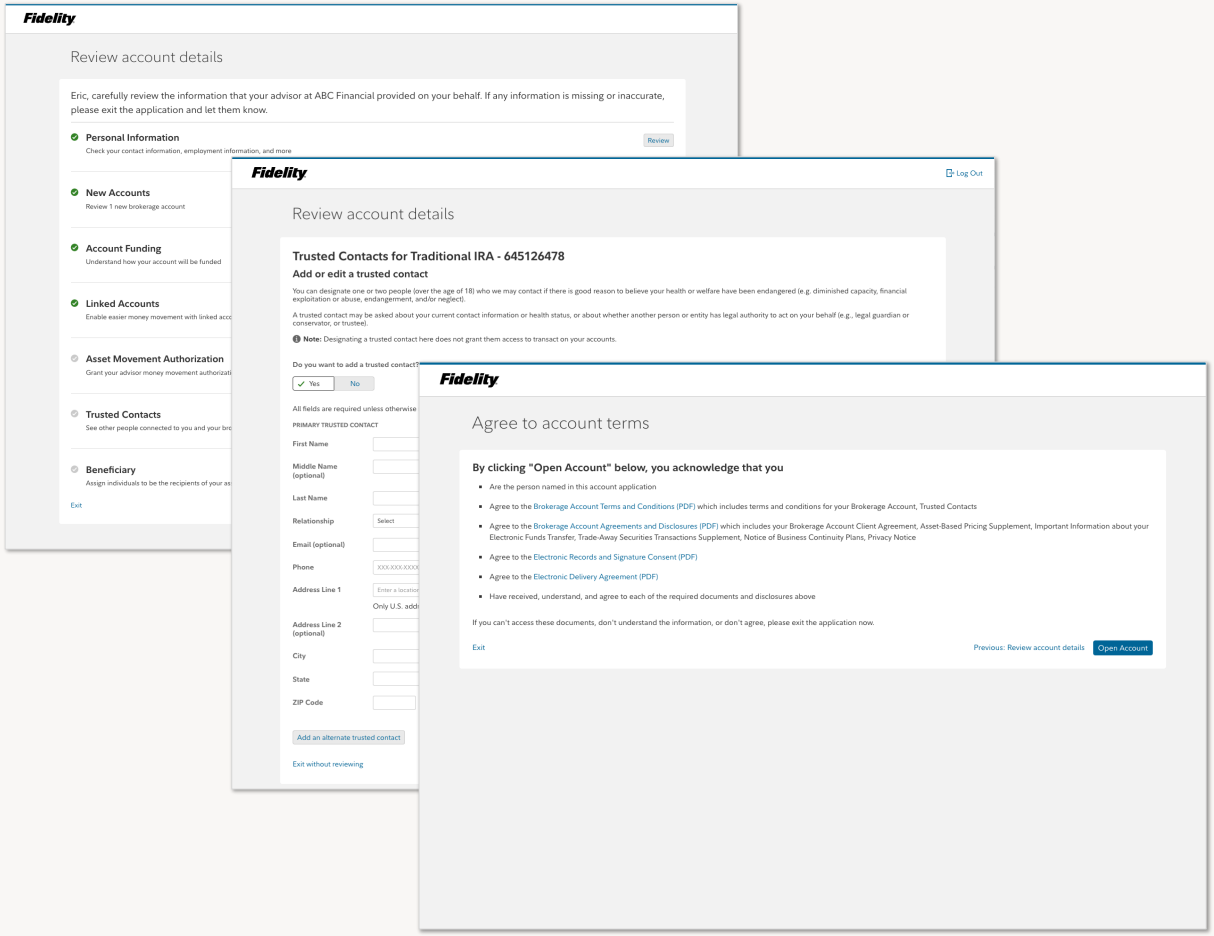
Q3

- Alternative Investment Onboarding Addendum
- Enhanced Click-to-Agree Data Editing
- Fund New Accounts via Journal Transfer

 Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Click-to-Agree

Wealthscape[SM] Click-to-Agree experiences provide a seamless, PDF-free digital workflow that simplifies onboarding, funding, and account maintenance while reducing errors, increasing transparency, and strengthening client trust.



Highlights

Click-to-Agree continues to advance a more efficient and client-friendly digital authorization experience by reducing manual processes, improving visibility into authorization status, and strengthening communication throughout the workflow. Recent enhancements help drive faster completion through automated reminders, improve operational accuracy by automatically managing outdated requests, and provide greater transparency when signers choose not to proceed by capturing their feedback directly within the experience. Looking ahead, planned enhancements will focus on reinforcing client trust through stronger firm branding and further simplifying advisor-supported digital authorization interactions.

Now Live 2026

Q2

- Reminder email
- Configurable Auto-Expiration
- Decline to authorize

Upcoming 2026

Q4

- White-labeled experience

Upcoming 2027

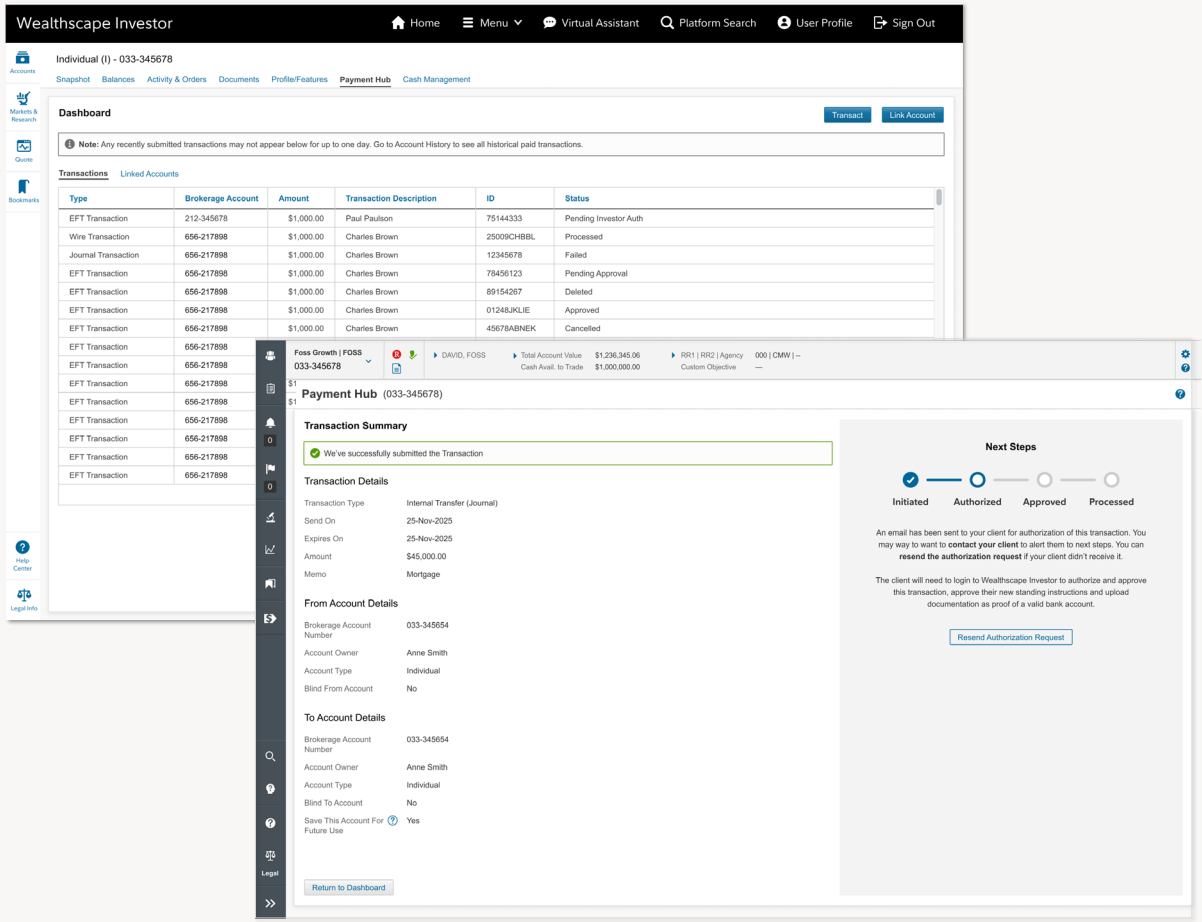
Q1

- In-person digital authorization

Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Money Movement

Greater transparency and self-service money movement for investors, with advisor access coming next year.



Highlights

Money Movement is enhancing the investor experience with a modern Payment Hub that provides greater visibility into account funding activity and self-service capabilities. If enabled by your firm, investors can create EFT transactions, EFT standing instructions (1st Party and Common 3rd Party), and cash-only 1st Party journal transactions. These capabilities are delivered through firm-managed entitlements, giving organizations flexibility to offer a more seamless digital money movement experience.

Now Live 2026

Q2

- API: Updated SWIFT ISO 20022 Wire Payments and Wire Payment Instructions

Upcoming 2026

Q4

- Payment Hub: Wealthscape Investor - General Availability

Upcoming 2027

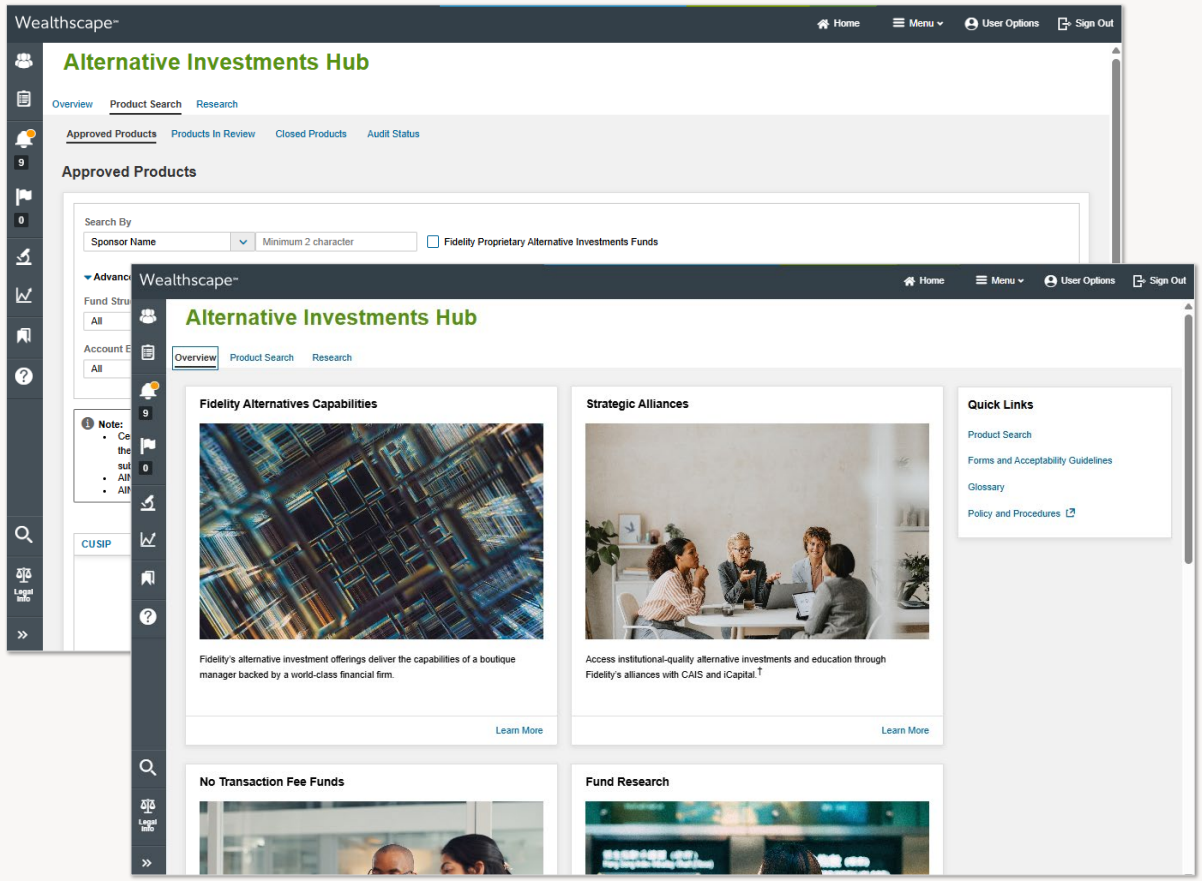
Q2

- Payment Hub: Wealthscape - Pilot
- Wealthscape Investor℠ Mobile: Money Movement (EFT & JNL)

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Alternative Investments

Enhancing the Alternative Investments experience with a centralized hub, intelligent automation, and expanded investment access.



Highlights

The latest Alternative Investments enhancements on Wealthscape[SM] simplify and streamline the client experience. A new Alternative Investments Hub centralizes research and product discovery in a more intuitive workflow, while expanded access to no transaction fee interval funds and enhanced search capabilities help users identify opportunities more efficiently. Machine learning-powered document validation within the order ticket flags missing information before submission, reducing operational friction and helping avoid delays. Updated forms and standardized templates further support a more efficient, user-friendly end-to-end experience.

Now Live 2026

Q3

- AI-embedded Alternative Investments Order Ticket
- Alternative Investments Hub
- Alternative Investments Form Revisions
- API - Account Profile Integration though CAIS and iCapital

Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Grow Smarter

Unlock insights, streamline tasks, and access the data you need in one place to drive better decisions



Intelligent Insights

Leverage actionable analytics and insights across the platform



Digital Service & Automation

Work smarter with a suite of digital tools



Data to Drive Your Business

Easily access the data you need

Solution Spotlight

- Digital Service Enhancements expand self-service capabilities, streamline onboarding workflows, and improve real-time communication through new Service Center APIs, BPM-integrated account onboarding, and enhanced Chat Assistant notifications.
- Wealthscape[SM] Intelligence Enhancements identify paper check users for targeted advisor outreach, helping increase electronic payment adoption, improve operational efficiency, and reduce risk.
- Data Collaboration Enhancements provide more timely access to open tax lot data and advance modern data-sharing capabilities, enabling firms to make faster, more informed decisions.

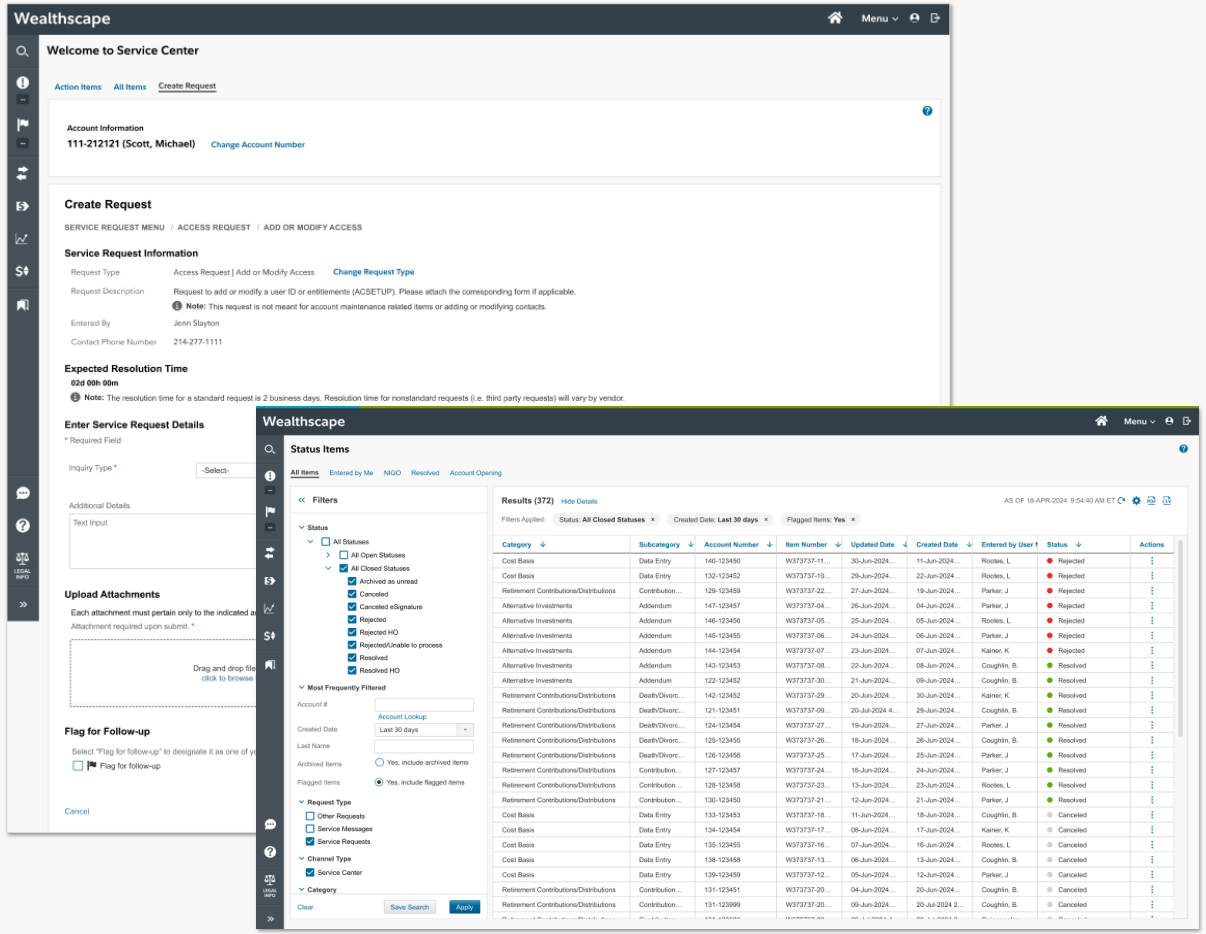
What does it mean to grow smarter?

- Platform-wide analytics and intelligence that deliver actionable insights for improved client outcomes.
- Digital tools and automation designed to enhance service and empower user-directed capabilities.
- A unified data experience to seamlessly access insights in one place.

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Digital Service Experience

We're creating a more seamless and efficient advisor experience through expanded self-service capabilities, streamlined onboarding workflows, and improved real-time service communications.



Highlights

This quarter, we are enhancing the service experience by making workflows more connected, transparent, and efficient across the advisor lifecycle. Key investments include new Service Center API capabilities that allow firms to access status information within their own digital experiences, and workflow automation integrated into account onboarding to improve visibility and streamline account opening processes. These advancements build on recent enhancements to Chat Assistant and Service Center, helping advisors resolve issues faster, reduce operational friction, and deliver a more seamless experience for clients.

Now Live 2026

Q2

- Chat Assistant: Autosuggestion of chat topics
- Chat Assistant: Refreshed User Interface
- Service Center: Refreshed Service Request Initiation App
- Service Center: Refreshed Status Grid

Q3

- BPM: Integration with Wealthscape℠ Account Onboarding
- Chat Assistant: Notifications with visual and audio
- Service Center: APIs - Search & Status & External Alerts

Upcoming 2026

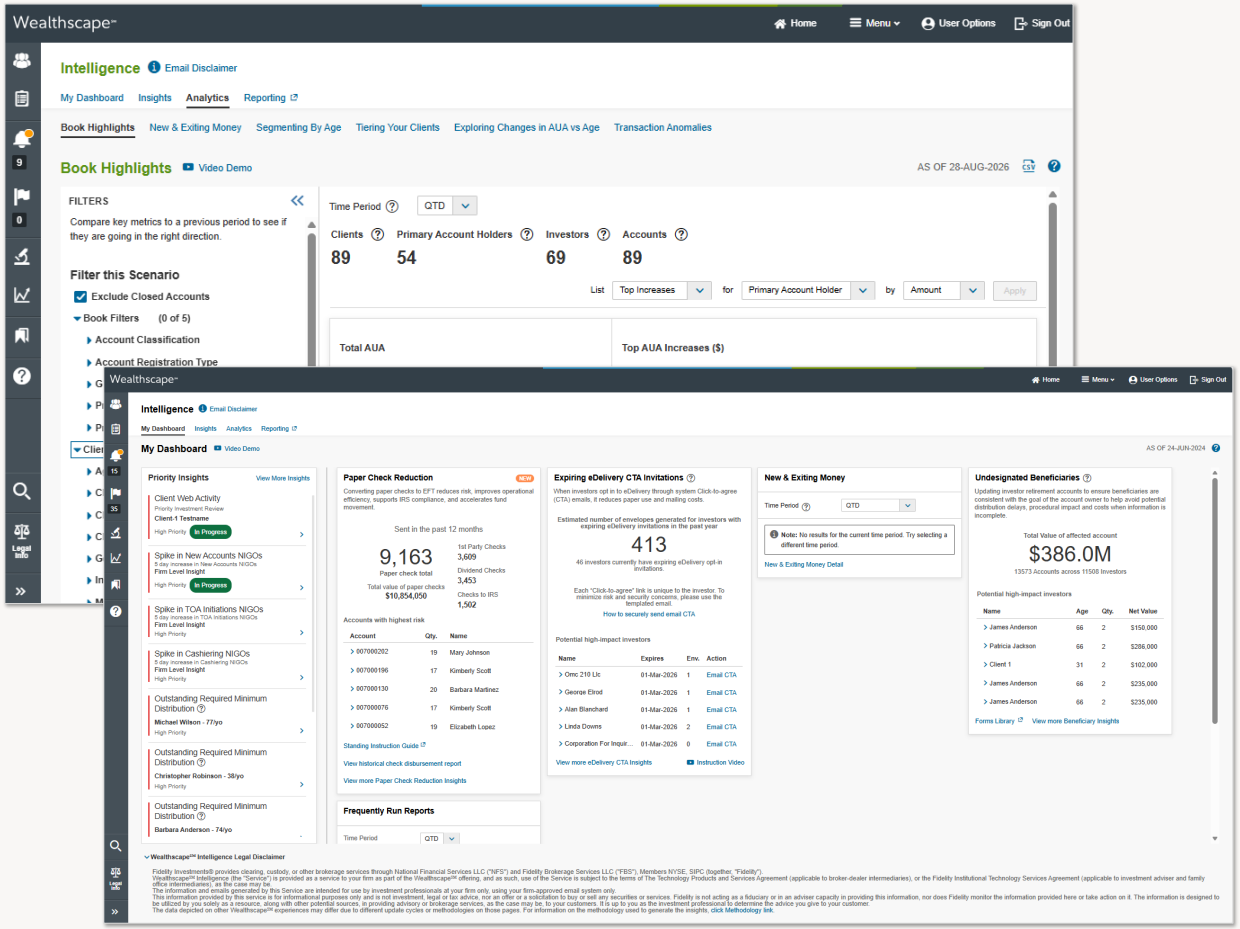
Q4

- Service Center: APIs - Status Details + Work Item Updates

 Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Intelligence

Empowering advisors with enhanced intelligence, streamlined workflows, and timely recommendations to support proactive client engagement and business growth.



Highlights

The recent Paper Check Reduction insight helps advisors identify clients using paper checks and encourage adoption of electronic payments, improving operational efficiency, reducing risk, and enhancing the client experience. Additional enhancements include expanded RMD insights for inherited IRAs and other retirement accounts, new sorting and export capabilities on the All Insights tab for easier insight management, and the removal of the five-day eDelivery waiting period to enable faster advisor follow-up and engagement.

Now Live 2026

Q2

- eDelivery - Removing the 5 day wait period
- Enhanced RMD – Include inherited IRAs
- Sort/ Export Insights on All Insights Tab

Q3

- Paper Check Reduction

Upcoming 2026

Q4

- API: Insights
- Export Insights

Upcoming 2027

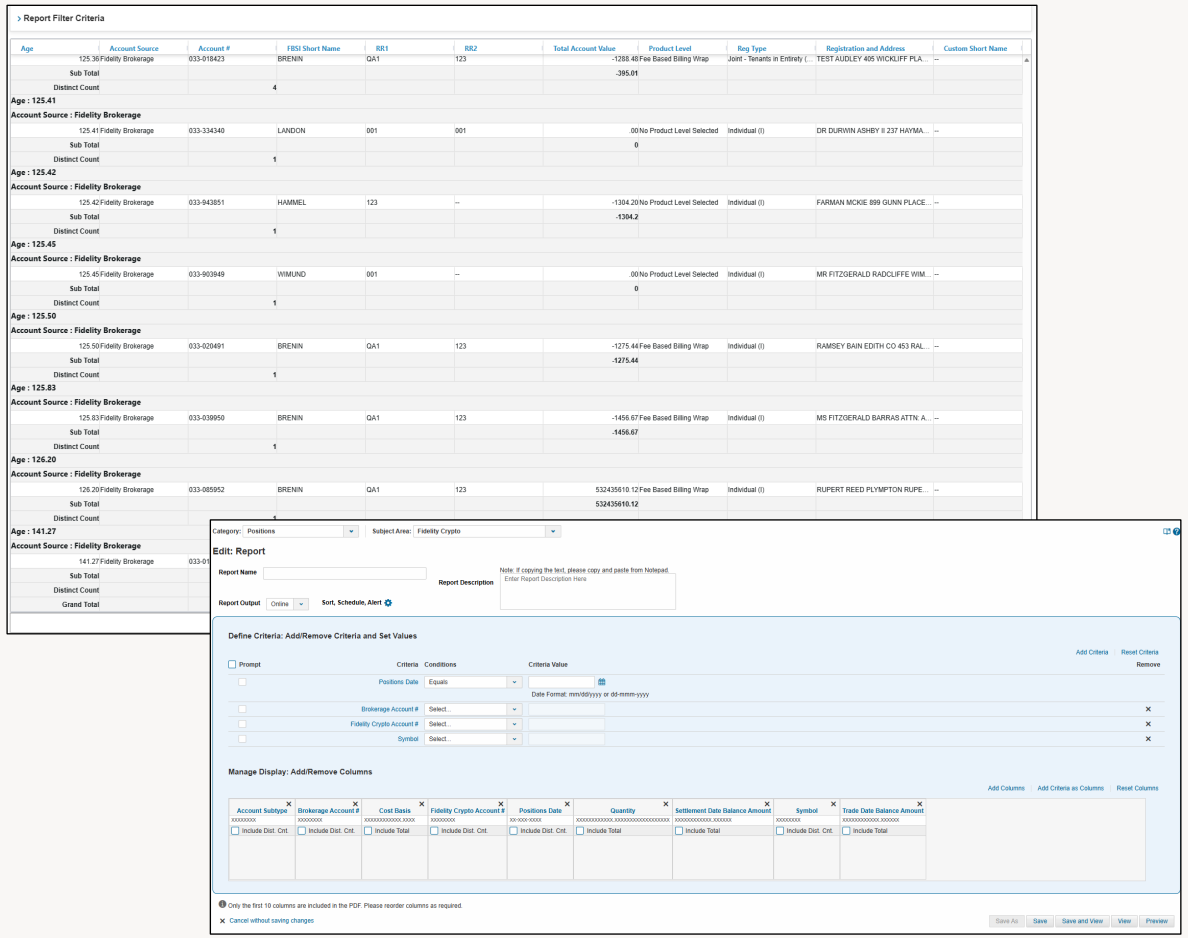
Q1

- Operations Scorecard

 Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Reporting

Strengthening reporting capabilities through enhanced risk visibility, regulatory support, and operational efficiency for advisors and operations teams.



Highlights

Reporting enhancements this quarter are focused on helping firms operate more efficiently, strengthen compliance oversight, and gain deeper visibility into client and account activity. Recent enhancements have expanded reporting coverage across representative structures, improved regulatory reporting precision through enhanced order and CAT data, restored key reporting capabilities such as PDF exports and report grouping, and added support for crypto pricing and cash position reporting. New capabilities arriving this quarter will provide advisors and operations teams with streamlined access to portfolio margin, liquidity, and account risk data, while also enhancing regulatory screening reporting to support customer identification and verification workflows.

Now Live 2026

Q2

- CAT Timestamp & Order Detail
- Crypto EOD Pricing & Cash Positions
- Entity Rep Code
- PDF Export & Grouping / Totals

Q3

- New Vendor CIP and BOIV Report - 216 C report
- Portfolio Margin Fund Detail Report

Upcoming 2027

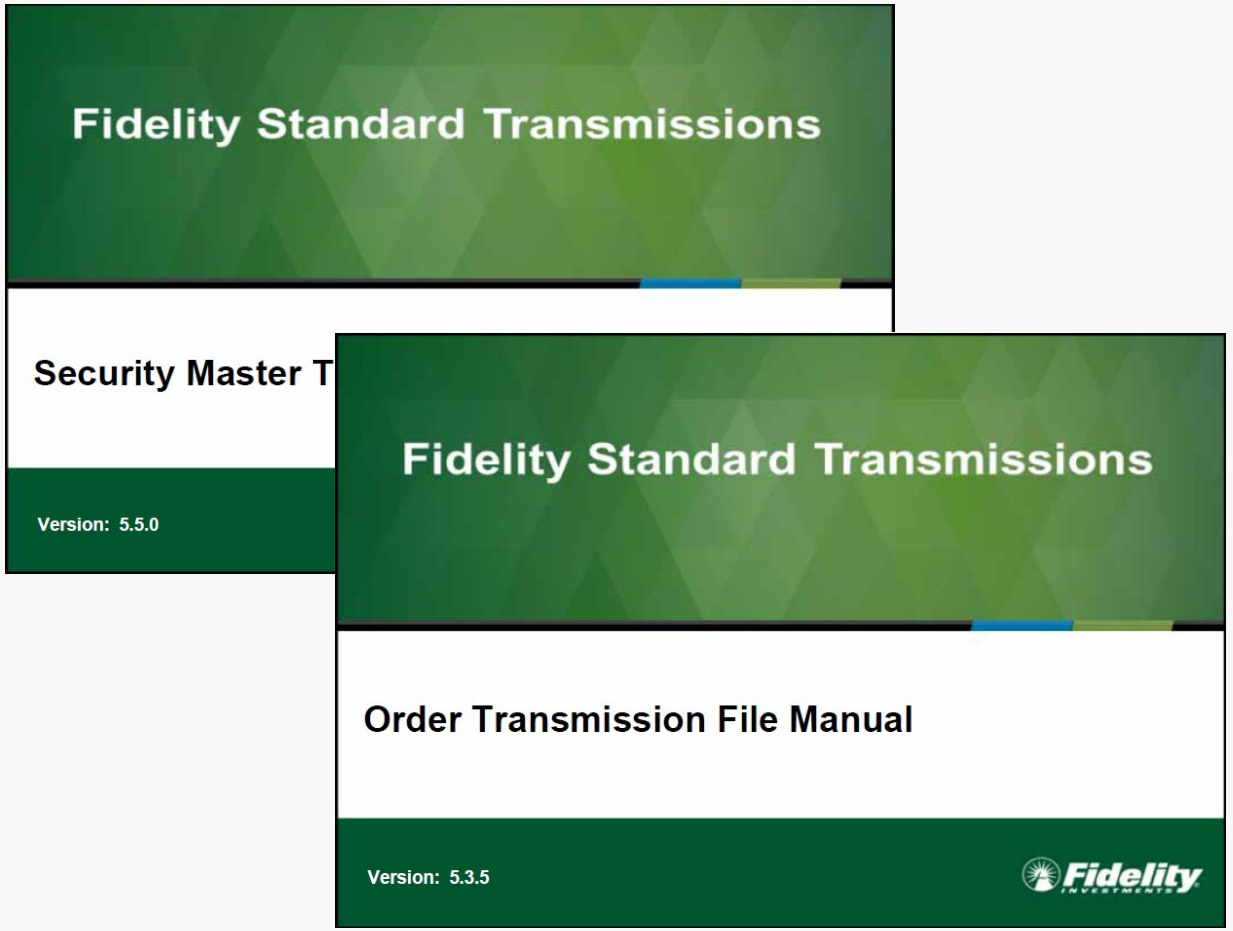
Q1

- Supplemental Household Summary Report

Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Data Solutions

Access to timely, actionable data is essential for firms seeking to improve efficiency, optimize workflows, and make informed business decisions.



Highlights

Continued investment in data access, flexibility, and modernization is delivering capabilities that clients have been asking for most. Key enhancements include expanded access to full daily Open Tax Lot data and new cloud-based delivery options that make it easier to consume and integrate critical operational data. At the same time, emerging data collaboration initiatives are laying the groundwork for more scalable, secure, and efficient data-sharing experiences. Together, these advancements help clients improve operational efficiency, accelerate data-driven decision making, and better align with modern technology architectures.

Now Live 2026

Q3

- Full Daily Open Tax Lot Transmissions

Upcoming 2026

Q4

- Expanded ICP Transmission Data Elements

Upcoming 2027

Q2

- Full Daily Closed Tax Lot Transmissions Available

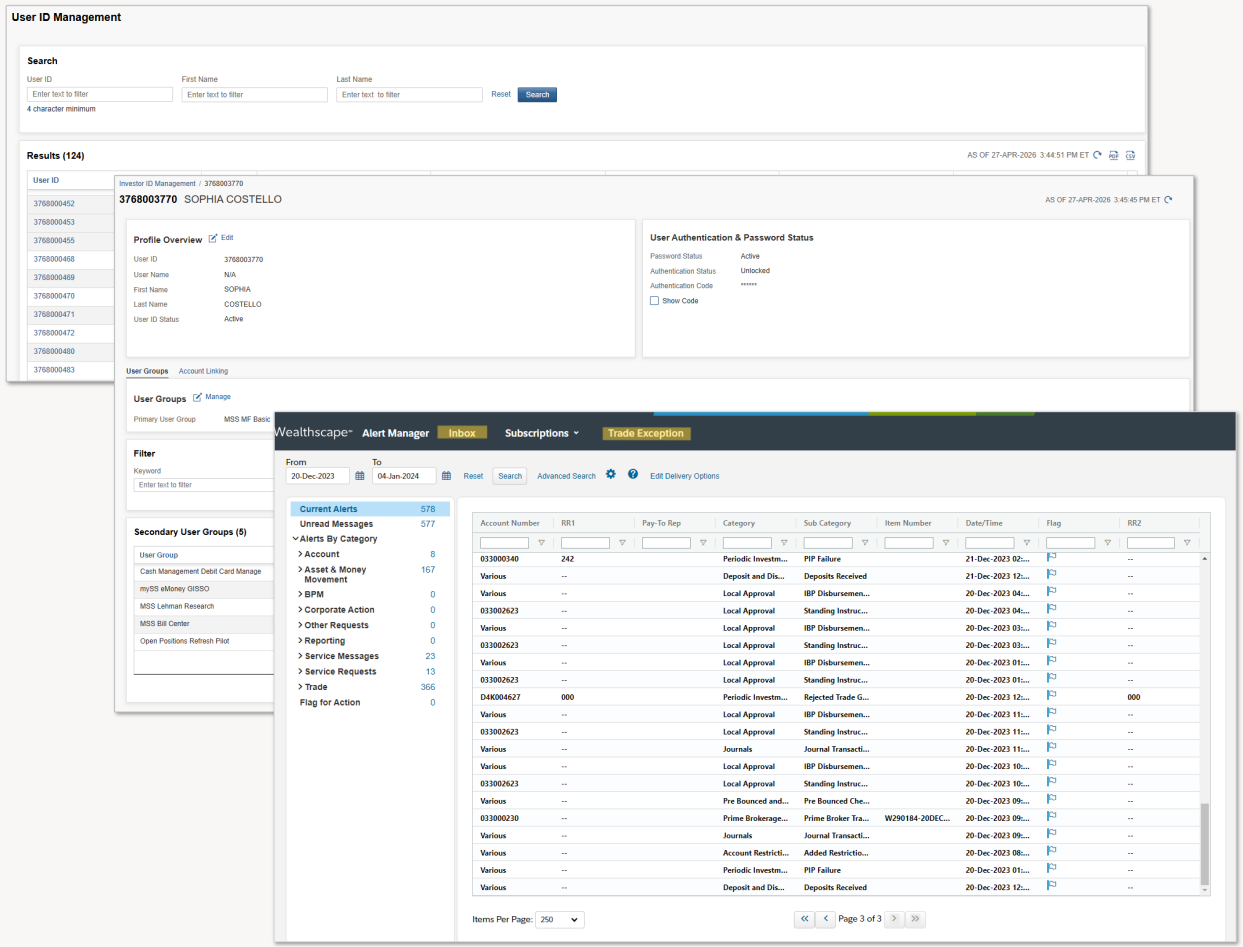
Q3

- Full Daily Open Tax Lot Transmissions Available For Approved Fintech Providers

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Operations

Enhancements that help operations teams work more efficiently through improved tools, connectivity, and workflow experiences.



Highlights

This quarter's enhancements are centered on creating a more connected, secure, and modern operations environment for firms. Key investments include enhanced identity management capabilities to simplify user access and governance, new real-time alert integrations that enable firms to incorporate operational notifications directly into their own workflows, and the introduction of a modern Operations Workstation pilot that delivers streamlined account inquiry and trade allocation capabilities through a more intuitive web-based experience. Together, these enhancements are designed to improve productivity, strengthen security, and provide a foundation for future operational innovation.

Now Live 2026

Q3

- Investor ID Management Pilot
- Operations Workstation Pilot

Upcoming 2026

Q4

- External Alerts - OAuth Gateway

Upcoming 2027

Q2

- Operations Workstation Generally Available – Wave 1

Q3

- Operations Workstation Generally Available – Wave 2

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Grow Further

Integrated, scalable, and secure technology solutions that create cohesive experiences, support rapid growth, and ensure performance and resilience



Integrated Experiences

Create holistic tech stack experiences with a full suite of third-party and brokerage-enabled integrations



Building for Scale, Stability & Security

Using cloud and next-gen tech to build scalable, resilient systems that boost growth, manage spikes, and improve performance

Solution Spotlight

- Integration Xchange Enhancements expand API capabilities, improve service request visibility, support automated investment workflows, and strengthen platform security through Multi Factor Authentication (MFA), helping firms build more efficient, secure, and scalable integrations.
- System-to-System Alerts (S2S) Alerts Enhancements strengthen digital connectivity by providing real-time event streams that support automation, monitoring, and integration across internal and external platforms.

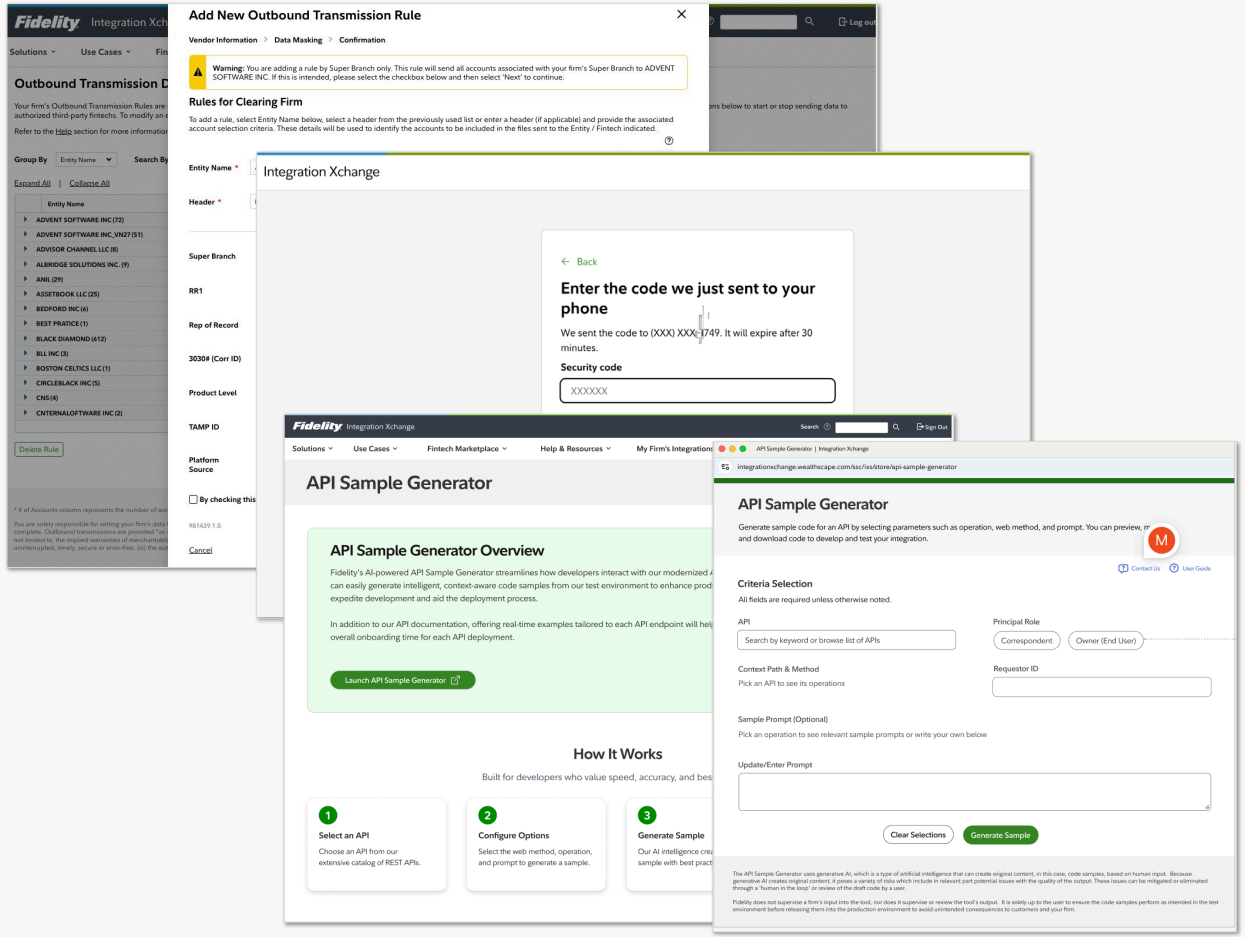
What does it mean to grow further?

- Robust integrations with the most meaningful tech solutions to help empower unique and impactful technology experiences.
- Fast, industry-standard components that provide enhanced monitoring and visualization.
- Scalable, resilient systems that support growth, ensure uptime, and protect data.

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Integration Xchange

Expanding integrations that streamline operations, automate workflows, and strengthen digital connectivity across the wealth management ecosystem.



Highlights

The integrations roadmap continues to deliver capabilities that help firms simplify operations, strengthen connectivity, and unlock greater automation across their technology ecosystem. Clients can benefit from new real-time event streaming, enhanced service request visibility, and expanded opportunities to automate investment and operational workflows. At the same time, wire modernization initiatives help firms prepare for upcoming industry requirements, while strengthened security controls reinforce a secure and scalable integration experience as digital adoption continues to grow.

Now Live 2026

Q2

- Add Rule Verification

Q3

- Platform Security - Login & Authentication

Upcoming 2027

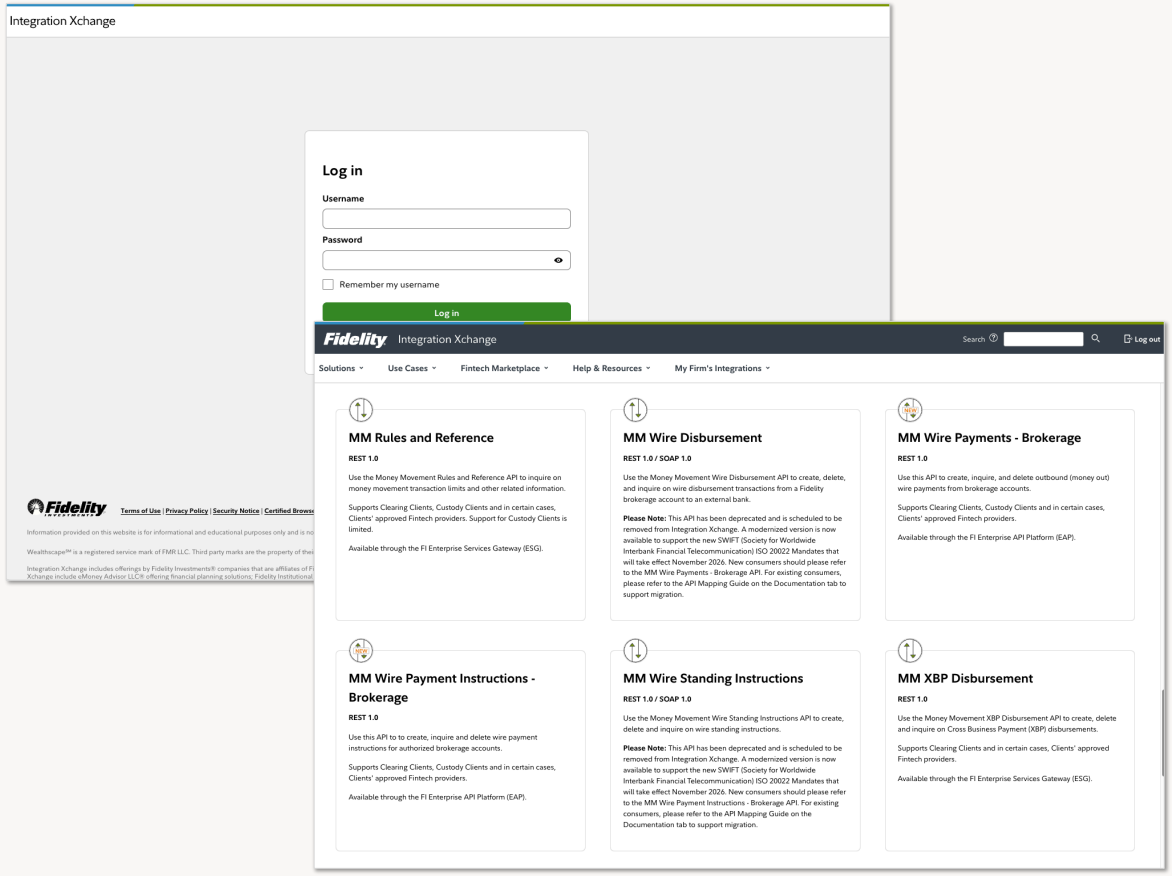
Q1

- API Sample Generator

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APIs

Empowering Firms Through API-Driven Connectivity



Highlights

This quarter brings expanded API capabilities that help firms integrate key workflows directly into their own platforms, including new Service Center APIs that provide real-time access to work item search, status, and details. Q3 also marks an important milestone in wire payment modernization, as firms prepare to transition to ISO 20022-compliant Wire APIs to maintain future API-based wire initiation capabilities.

Now Live 2026

Q2

Digital Security: Platform Login – Secure Connectivity with Stratum

Q3

Money Movement: API: Updated SWIFT ISO 20022 Wire Payments and Wire Payment Instructions

Upcoming 2026

Q4

Account Onboarding: Disclosure Delivery

Digital Service: Service Center Work Item, Service Center Search

Trading: Periodic Investment Plan

Intelligence: Insights

Upcoming 2027

Q1

Account Onboarding: Account Management, Transactions Bundler, Documents

Reporting: Supplemental Household Summary Report

Q2

Account Onboarding: Standing Instructions Composite, Journal Funding Transact

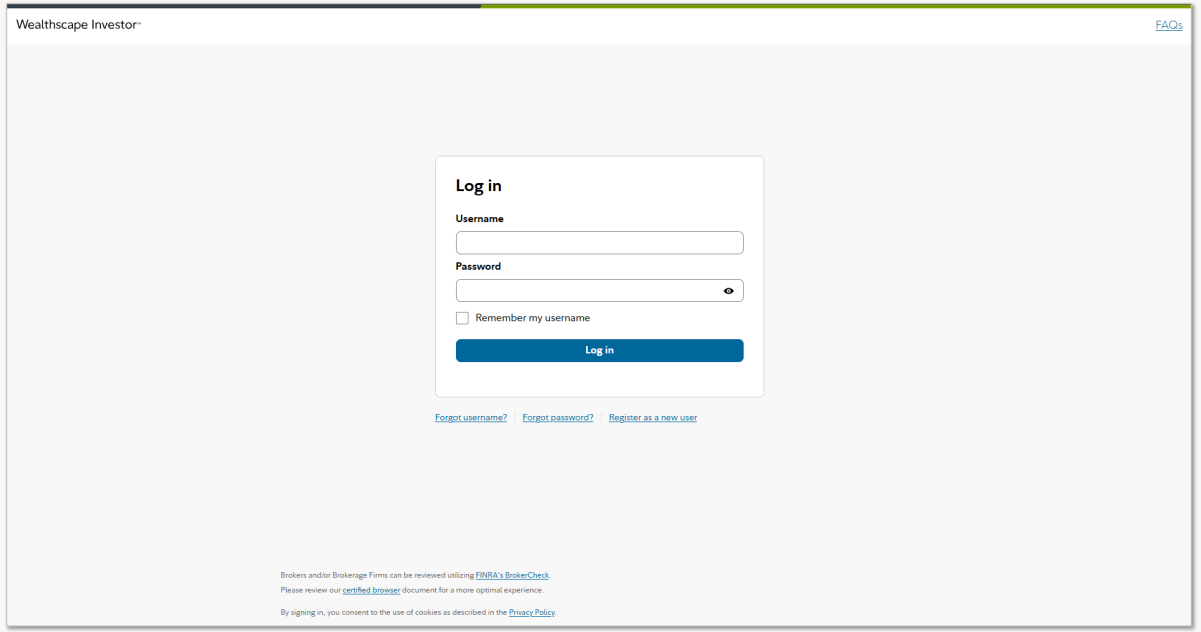
Q4

Platform Experience: Account History & Account Profile

 Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

Digital Security

Secure, client-controlled data access powered by modern authentication and privacy-first design.



Highlights

Security remains a key area of investment, with upcoming enhancements focused on strengthening authentication, expanding secure connectivity with third-party applications, and giving clients greater control over how their financial data is shared. Over the coming roadmap horizon, clients can expect improvements such as enhanced login standards, secure delegated access for integrations, customer-directed data sharing through modern consent-based frameworks, and additional multi-factor authentication options, all designed to deliver a more secure, privacy-focused digital experience.

Now Live 2026

Q2

- Platform Login: Secure API Connectivity with Stratum

Upcoming 2026

Q4

- Platform Login: Wealthscape Investor - Customer Directed Data Access

Upcoming 2027

Q2

- Platform Login: Multi Factor Authentication - Time based one-time PIN

Rollout schedule subject to change. Screenshots are for illustrative purposes only. For investment professional use only.

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