

Powered By BondWave

Fulcrum Point Financial Attracts \$120 million In Six Months for Serviced Bond Solution

WHO WE ARE

BondWave provides financial professionals with powerful investment and practice management tools designed to facilitate individual bond investing. Traders and advisors use our tools to provide a superior fixed income experience to their clients. BondWave is liquidity and trade agnostic and focused on providing a simple, sophisticated user experience around individual bond investing.

BACKGROUND

Fulcrum Point Financial is a provider of full service fixed income support for independent registered investment advisors, broker dealers and institutions. Fulcrum services 9 clients with \$120+ Million assets under service.

THE CHALLENGE

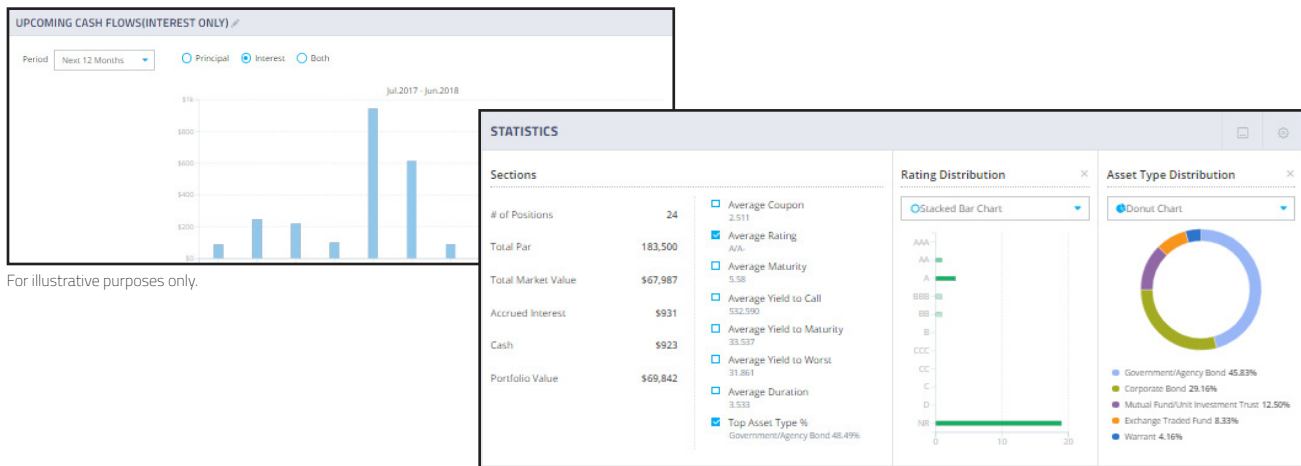
Fulcrum had a number of clients who were trying to navigate their fixed income bond allocations, particularly in a rising rate environment. Many investors were seeking to diversify and optimize their bond holdings, yet many advisors only offered clients a limited range of investment options because of the complexity of fixed income investing. Fulcrum needed a solution to enable advisors to have a more seamless and transparent view into the broad individual bond market and the various investment options available.



Imagine that

THE SOLUTION

Fulcrum launched their Serviced Bond Solution in October 2016 and within 6 months amassed more than \$120 million in assets under service. The solution enables advisors to offer clients custom individual bond portfolios based on their needs. BondWave’s underlying technology platform utilizes specific bond types and criteria to enable users to create and monitor an account to its assigned strategy. Custodian connectivity enables the platform to monitor overnight for events such as announced calls and refundings, upcoming calls and maturities, downgrades, EMMA material events and continuing disclosures, corporate actions, changes in account position values and investment policies, among other factors, as well as automated reporting and access to Fulcrum’s trading desk.



For illustrative purposes only.

For illustrative purposes only.

THE RESULT

Fulcrum Point Financial services \$120 million in assets in six months.

Fulcrum, utilizing BondWave’s technology, helped an underserved section of the market, advisors with little to no experience with the fixed income individual bond market. Providing a clear view into the fixed income market, Fulcrum was able to arm their clients with a solution to better serve their clients’ fixed income allocation needs.

To learn more, please contact us at info@bondwave.com or by calling 630.517.7017