Integration with Wealthbox

Wealthbox

Wealth management firms using Wealthbox benefit from a seamless integration with Max, the industry-leading cash management solution for held-away cash.

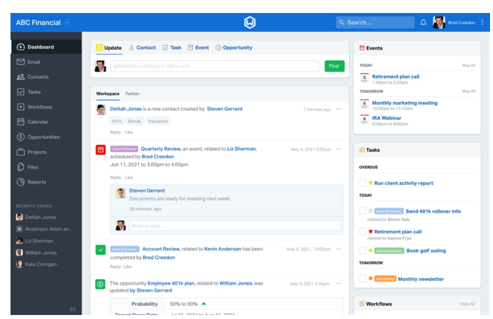
Integration Benefits

Clients appreciate Max's industry-leading cash management solution, allowing them to access preferred rates on held-away cash, obtain broader FDIC coverage, and benefit from other features such as consolidated tax reporting.

Advisors appreciate how Max helps them deliver market-leading rates on cash from leading online savings accounts while gaining visibility into held-away assets to support broader goals-based planning and AUM growth.

Advisors and client service teams can use Wealthbox CRM to kick off the setup process for clients, saving time while increasing the accuracy of client information.

How It Works



1. Make sure you have registered for a Max Advisor Dashboard.

   Don't have a Max Advisor Dashboard account? You can register for free in 1-2 minutes at MaxForAdvisors.com

   Click on "Integrations" and select "Connect to Wealthbox"

2. When viewing a Contact in Wealthbox, simply click on "Contact Details" and select "Send To" then "Max"

   If you haven't yet connected your Max Advisor Dashboard to Wealthbox, you'll authenticate with your Max Advisor Dashboard login and password as a one-time step to connect Max and Wealthbox.

3. Click "Submit" when done.

Questions? Need Help?

If you you need support, contact support@wealthbox.com.

For questions about Max, contact advisors@maxmyinterest.com for general questions or use the Contact Us page: MaxMyInterest.com/Contact-Us for client-specific questions.