



Account information for retirement plan accounts on the IPX Platform recordkeeping system can now be accessed through external account aggregation at over 200 financial institutions and platforms across the U.S.

IPX has partnered with [Yodlee](#), an Envestnet company, to integrate with banks, credit unions, brokerage firms and other financial services providers. This integration enables the display of IPX retirement account information like account balances and transaction data on account aggregation dashboards. For IPX recordkeeping clients, this holistic view of all their retirement accounts can offer better insight into retirement planning decisions.

### Financial Institutions/Platforms Integrated With IPX Retirement

AccountingSeed	Cleanshelf
Alabama Teachers Credit Union	Cloud Telecoms
Alka Finance	Comcorp
Allposit	Comerica
Ameriprise	Communication Federal CU
Amoco Federal Credit Union	ComplianceAlpha by ACA
Apprise Labs	ComplianceAlpha by ACA Group
Argus	ComplianceAlpha for Acme Capital
AssetMark	ComplianceAlpha for Adamas Partners
Baird	ComplianceAlpha for Alyeska
Bivio	ComplianceAlpha for American Century
Bluleaf	ComplianceAlpha for American Infrastructure
BMO Harris Bank	ComplianceAlpha for Anchorage
Bookipi	ComplianceAlpha for Benchmark Plus
Boss Insights	ComplianceAlpha for Brigade
BQE Software	ComplianceAlpha for Cadian Capital
Bright Horizons	ComplianceAlpha for Calera
Burgher Haggard	ComplianceAlpha for Capricorn
Buxfer	ComplianceAlpha for Chalkstream
Calcutrack	ComplianceAlpha for CM Capital
Carson Wealth	ComplianceAlpha for Contour
CashAnalytics	ComplianceAlpha for Crimson
Centorbi	ComplianceAlpha for Elliott Management
Cetera	ComplianceAlpha for Eos Management

ComplianceAlpha for Ferrer Freeman  
ComplianceAlpha for Fir Tree Partners  
ComplianceAlpha for Freshford  
ComplianceAlpha for GennX360  
ComplianceAlpha for GMT Capital  
ComplianceAlpha for Griffis  
ComplianceAlpha for Healthcor  
ComplianceAlpha for HedgeOp  
ComplianceAlpha for Housatonic Partners  
ComplianceAlpha for IGP Industries  
ComplianceAlpha for Ironwood  
ComplianceAlpha for JD Capital  
ComplianceAlpha for JonathanRoseCo  
ComplianceAlpha for Khronos  
ComplianceAlpha for Kylin Management  
ComplianceAlpha for Legacy Venture  
ComplianceAlpha for Linden Advisors  
ComplianceAlpha for Long Pond Capital  
ComplianceAlpha for Madison Intl Realty  
ComplianceAlpha for Makena Capital  
ComplianceAlpha for Matrix Capital  
ComplianceAlpha for MicroVest  
ComplianceAlpha for Miller Global  
ComplianceAlpha for Mirabella  
ComplianceAlpha for Monarch  
ComplianceAlpha for Morgan Creek  
ComplianceAlpha for Nautic  
ComplianceAlpha for Odyssey  
ComplianceAlpha for Old Hill  
ComplianceAlpha for Peconic Partners  
ComplianceAlpha for Quantlab  
ComplianceAlpha for Rivulet  
ComplianceAlpha for Saba Capital  
ComplianceAlpha for Seer  
ComplianceAlpha for Sidus  
ComplianceAlpha for Solamere Capital  
ComplianceAlpha for Soroban Capital  
ComplianceAlpha for Stone Point  
ComplianceAlpha for Tontine  
ComplianceAlpha for TSG Consumer  
ComplianceAlpha for Victory Park  
ComplianceAlpha for Winston  
Compound  
Continental Finance  
contineo  
CountAbout Corporation  
CrossFirst Bank  
Datametrics Software

DeLeo and Company  
Denali  
Diamond NestEgg  
Dividends360  
Doc Equity  
Dynamic Ideas  
E\*TRADE  
Edward Jones  
EFMRL  
Envestnet Retirement Solutions  
Envestnet Tamarac  
EveryIncome  
ExpenseWire  
EzControl  
Fiduciary Trust International  
Financial Symmetry  
FinancialJoe  
FinGoal  
Finovera  
Freshbooks  
Fundsquire  
Future Foundry  
Fyle  
Fyncr  
Geowealth  
Greyline  
GuideCenter  
HG Tech  
ID Watchdog  
IGG Software  
Income Lab  
InfoArmor  
Integreat Consulting  
Intelliflo  
InvestorKeep  
Iryss  
ItiliteTechnologies  
JetsonSystems  
John Hancock  
Joot  
Kashoo  
Kenandy  
KeyBank  
Kubera Labs  
Libertas  
Lifeboat Finance  
LQD Business Finance  
LQDFinance

Meant2BFree  
Miles Technologies  
MoneyEdge  
MoneyMinder  
MoneyPlanned  
moneyspire  
Moneytor  
Morgan Stanley  
Myfxbook  
MYNANCE  
Nerdworks  
Northwestern Mutual  
NortonLifeLock  
Odo  
Owl Invest  
Paycom  
Payoff.com LLC  
PictureWealth  
Pluto  
Pocket Money  
Principal  
Property Boulevard  
Prudential  
PWC InsightsOfficer  
Qualia  
Reclaim  
Remotiv  
Restaurant365  
RewardStock  
RIA Compliance  
Rightcapital  
Ripsaw  
SAP Concur  
Second Street  
Seidr  
Sitepod  
SmartyApp  
SSNC  
Standard Bank ZA  
StockRover  
Swipe4Humanity  
T. Rowe Price  
The Harvest Plan  
The Neat Company  
The Wealth Pool  
Thomson Reuters  
Thrivent  
Tiller

Tradesmith  
TradeSmith  
Transamerica  
TransparenTech  
TripsWare  
United Financial Freedom  
US Bank  
VectorVest  
Versys.com  
Verify  
Wanido  
Wealth Access  
Wealthcare Capital  
WealthHub Solutions  
WealthTrace  
White Peak Tech  
Willis Towers Watson  
Wilmington Trust  
Worldpay from FIS  
Yahoo Finance  
Ygrene Energy  
Zipbooks  
Zoho Books