









Integration Partners

Dynamic Planner supports integrations to most major adviser back office systems.























Back office & CRM


			
	Coming soon 	Coming soon 	Coming soon 

You can also use Dynamic Planner to directly request valuations from a wide range of platforms and providers.

Credentials not entered

You will need to enter credentials for these platforms in order to request valuations.

			
			
			
			
			
	Coming soon 		



Valuations supported by Tram
Clients with an active Tram account will be automatically revalued each night for supported platforms.





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