

PPB Capital Partners Hires WEV Consulting to Enhance & Improve Investor Portal

Conshohocken, PA, July 08, 2021 – PPB Capital Partners, a provider of alternative investment solutions and streamlined processing for wealth advisors, has partnered with WEV Consulting to revolutionize its wealth advisor investment portal. The portal is designed to improve the wealth advisor’s investment experience through a technology solution that delivers increased transparency, enhanced reporting and simplified investment onboarding to advisors and their clients nationwide.

“PPB selected WEV Consulting to lead this project because of their in-depth operational experience and knowledge of the technology solutions available to advisors today. WEV was founded to help streamline middle-office functions including fund accounting, fund administration, tax, and audit. Led by WEV Consulting’s founder, William Vastardis, the project will dramatically improve the investment portal’s functionality while maintaining and improving its high-touch client support model,” said Brendan Lake, PPB Founder and CEO.

“Many of PPB’s competitors have offered similar technology solutions with a goal of reducing the need for personal support when making investments in private funds. PPB has listened to numerous advisors share their experiences using these systems and is now leveraging that feedback to develop an enhanced tool that not only builds on the reporting features, but also enhances the overall client experience. One big differentiator for PPB is that technology will always be a tool we can use to support advisors. Technology will never replace our commitment to providing best-in-class, bespoke service,” said Lake.

Vastardis is a 45-year veteran of the financial operations industry. Prior to founding WEV, he served as Chairman of Conifer Financial Services where he oversaw the global operations of the firm. Conifer, with \$110 billion in assets under administration, was acquired by SS&C Technologies. Prior to the acquisition, Vastardis was President and CEO of Vastardis Capital Services, which merged with The Conifer Group in 2014.

“Wealth advisors nationwide have shared that many of the portals available today only allow them to electronically make an investment, but do not provide client support or any additional reporting post-transaction,” said Vastardis.

PPB’s mission is to create a centralized tool that makes it easier for advisors to get the information they need, when they need it. By working alongside advisors at every stage of development, PPB plans to create a technology resource that not only simplifies the process of making new and ongoing investments, but also manages the operational, middle-office tasks of their clients’ investments.

“At PPB our goal is to be an extension of wealth advisors’ businesses. We understand the role that technology plays in their practice and growth initiatives,” said Lake. “With this revolutionized portal, we have given wealth advisors greater flexibility and tools to serve their clients, especially as the alternatives industry grows and becomes more complex.”

To learn more about PPB’s Investor Portal or PPB’s Fund Platform, please contact advrel@ppbadvisors.com.

About PPB Capital Partners

Launched in 2008, PPB Capital Partners, LLC (or "PPB" or "the Firm") brings premier alternative investment solutions and streamlined processing to the wealth advisor community. PPB Capital Partners provides a roster of alternative investment managers, as well as builds and operates feeder funds and customized fund of funds for wealth advisory firms.

Important Disclosures

This document or any part thereof may not be reproduced, distributed or in any way represented without the express written consent of PPB Capital Partners, LLC. This document is not to be distributed to the general public. A copy of PPB Capital Partners, LLC's written disclosure statement as set forth on Form ADV is available upon request. Although the information provided has been obtained from sources which PPB Capital Partners, LLC believes to be reliable, it does not guarantee the accuracy of such information and such information may be incomplete or condensed. PPB Advisors, LLC is an affiliate of PPB Capital Partners, LLC by virtue of common control or ownership.

The statements included in this material may constitute "forward-looking statements" and are subject to a number of significant risks and uncertainties. Some of these forward-looking statements can be identified by the use of forward-looking terminology such as "believes", "expects", "may", "will", "should", "seeks", "approximately", "intends", "plans", "estimates", or "anticipates", or the negative thereof or other variations thereof or other variations thereon or comparable terminology. Due to these various risks and uncertainties, actual events or results of the actual performance of an investment may differ materially from those reflected or contemplated in such forward-looking statements and no assurances can be given with respect thereto.

Certain securities offered through Registered Representative with Vigilant Distributors LLC (Member FINRA/SIPC), which is not affiliated with PPB Capital Partners or its affiliates.