Accounts Dashboard

The Accounts Dashboard gives advisors total control over trading client accounts while maximizing efficiency and productivity across their entire book of business.

- Elite
- Ignite
- Ultimate
- ✓ Trading

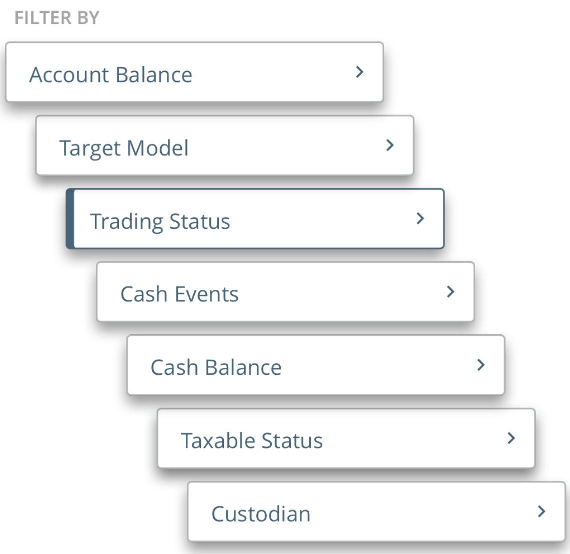
Search, filter, and sort to your heart's content.

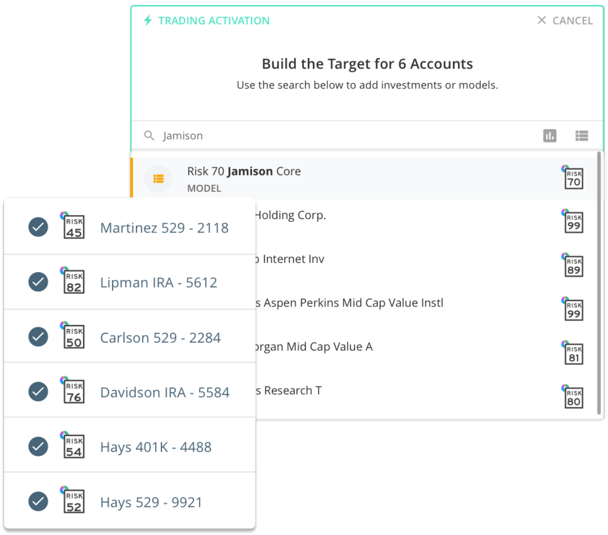
The Accounts Dashboard was built to be your one-stop shop for trading client accounts. It's your entire book of business in one place where you can easily search, filter, and sort to take action.

Need to filter by accounts not activated for trading? We can do that.

Want to see which accounts have a quarterly cash distribution set? Easy.

What about finding all accounts for Diane and Doug Lipman? No problem.





Apply changes across multiple accounts on the fly.

When you can filter and find the accounts you need, it's even easier to take action.

Whether you need to make cash distributions, target allocation changes, model changes, or activate trading, you can apply those bulk changes across dozens of accounts with just a few clicks. And when you are ready to make those trades, they're all queued up for you in your trading inbox.

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Nitrogen
470 Nevada Street
Auburn, CA 95603

844-4-NITROGEN
844-464-8764
Fax 530-748-1661

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@nitrogenwealth