

PCR Insights Elevates Wealth Management with Advanced Financial Data Aggregation



Wilton, Connecticut Jul 7, 2025 ([IssueWire.com](https://www.issuewire.com)) - [PCR Insights](#) (Operating as Private Client Resources), a seasoned fintech innovator founded in 2000, is leading the transformation of [financial data integration](#) and reporting for wealth managers, family offices, RIAs, private banks, and enterprises worldwide.

Streamlined Multi-Source Data Aggregation

PCR's cutting-edge platform enables automated collection, transformation, validation, reconciliation, and publication of financial data from custodians, banks, broker-dealers, and alternative investments. Serving over 300 firms across 3,000+ institutions—and processing \$500 billion in assets and 150,000+ accounts—PCR ensures seamless T+1 delivery of enriched, error-resistant transaction and portfolio information.

Robust Quality & Compliance Controls

Employing AI-powered OCR and NLP, PCR delivers machine-precise data extraction, monitored by an expert operations team for manual oversight when needed. Comprehensive validation and multi-tier reconciliation guarantee high data integrity, suited for performance, compliance, and risk management applications.

Portfolio Reporting & Custom Integration

Offering a unified platform for consolidated wealth reporting, PCR supports customized views, real-time performance tracking, and risk assessment across all asset classes—including custodial, banker, and illiquid holdings—via API fed into third-party reporting systems like Addepar and Solovis.

Managed Services & Scalable Partnerships

PCR's portfolio extends beyond technology. Through reseller and integrator partnerships, they support

[fintech and wealth-tech providers](#) with managed data services—covering onboarding, historical data backfill, and certified user support—so clients concentrate on value delivery, not data logistics.

Enterprise-Grade Solutions & Security

With over two decades of experience, PCR backs enterprise-grade features—secure API access, [custodial integration](#), private equity reporting, transparency workflows, and strict compliance protocols. Their system empowers private banks, custodians, and broker-dealers to unify reporting across legacy systems efficiently.

About PCR Insights

PCR Insights (Private Client Resources), a private equity-backed firm headquartered in Wilton, CT, with global offices in Rotterdam, Mumbai, and Danbury, offers a unified data aggregation solution covering both [liquid and alternative assets](#). Trusted by wealth managers, advisors, and global private banks, PCR bridges the complexity of multi-source financial data into clean, actionable insights.



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