



TCA Has Partnered with MoneyGuidePro

Trust Company of America (TCA) has partnered with MoneyGuidePro, the industry's leading financial planning software, enabling advisors and their staffs to link profile and client account information, such as balances and positions, to MoneyGuidePro's financial planning software.

TCA provides account level positions and balance information to MGP. Previously, we could only send this info to MGP through Albridge. The integration requires statement families on accounts at TCA in order to send info to MGP. TCA will add the initial statement family set up feature to applicable accounts as needed – you will need to have clients complete a Statement Family Form to have an active statement family established.

If you would like more information or are interested in setting up your real-time integration between TCA and MoneyGuidePro, please contact your TCA relationship manager or sales@moneyguidepro.com.