
CROESUS APIS AND WIDGETS

Leverage financial data and functions into applications using integration tools



Seamless integration

APIs allow key account- and position-level data exchange between Croesus and third-party applications through a range of standard protocols. The API list is constantly growing based on client and market needs.

Types of APIs available

- ✓ Account
- ✓ Client
- ✓ Portfolio
- ✓ Relationships
- ✓ Transactions
- ✓ Performance
- ✓ Much more

Secure data exchange

Financial APIs and financial performance APIs allow firms to achieve total data integrity and confidentiality using the highest level of security and privacy achieved through TLS encryption and two-way SSL authentication. Croesus also provides IP filtering, which empowers firms to allow or deny access to APIs by using specific IP addresses.

Built for developers

APIs are developed using RESTful web services that return JSON, ensuring scalable technology and providing seamless integration. The comprehensive list of APIs can be accessed through a dedicated developer portal.

Effortless data integration

Croesus UI Widgets allow complex financial data to be accessed using data visualization or streamlined tables.

Accessible

Data can be integrated directly into a web browser, smartphone, or tablet.

Custom look and feel

Widgets can be fully customized, matching the look and feel of advisor or investor applications.

About Croesus

Since 1987, Croesus has been providing sophisticated wealth management solutions to financial institutions throughout North America. Currently, 14,000 investment professionals use Croesus solutions to manage over \$1 trillion in assets. With its 180 dedicated employees, Croesus has built a reputation on the ability to efficiently transform data into information, develop portfolio management solutions to drive efficiency and deliver business intelligence for fact-based decision-making.



www.croesus.com