

Connect Wealth

Automated Portfolio Management for Crypto Institutions

Model portfolios. Account subscriptions. Block-trade rebalances with synchronized execution across every client account*

sFOX Connect Wealth is the infrastructure layer for managing crypto portfolios at scale. Firms can create model portfolios, subscribe client accounts, and execute synchronized rebalances across their entire client base through a single operational workflow.

One Block Trade. Every Account. The Exact Same Price.

Connect Wealth enables model-driven crypto portfolio operations at scale. Managers can:



Create and edit model portfolios (target weights by asset)



Maintain logging for operational visibility and future reporting



Trigger rebalances on demand with one action



Execute efficiently through the sFOX trading infrastructure



Assign client accounts to a portfolio

Core Capabilities Include



Synchronized Execution

Rebalances execute as a single aggregated trade, with tranches allocated to every client account at the same fill price



Multi-Account Orchestration

Assign accounts to portfolios and manage rebalance targets across your entire client book



On-Demand Rebalancing

Crypto markets move 24/7. Trigger portfolio rebalances instantly as market conditions evolve



Portfolio Creation and Management

Create and modify model portfolios quickly as digital asset markets evolve



Institutional Execution

Powered by sFOX's institutional liquidity network spanning 40+ exchanges and OTC venues



Audit Trail and Reporting

Receive a full logging of rebalance events, order fills, and portfolio state changes

Infrastructure for Institutional Crypto Portfolio Management

Connect Wealth combines model portfolio management, synchronized multi-account execution, and institutional trading infrastructure into a single operational workflow.

Built for RIAs, wealth platforms, neo-banks, and digital asset managers operating at scale.

See how institutional crypto rebalancing should work.

Book a demo at sales@sfox.com or visit sfox.com/connect-wealth-demo