



Client Success Story **Neptune-GBX**

How Neptune-GBX Expanded Advisor Access to Precious Metals with ByAllAccounts

“ByAllAccounts gives us a scalable way to reach advisor platforms while allowing our team to stay focused on what we do best.”

Chris Blasi

Founder & CEO

Company

Neptune Global Holdings LLC,
DBA Neptune-GBX

Application used

ByAllAccounts – Data Integration Service

Use cases

Data Distribution

Industry

Precious Metals

For more than two decades, Neptune-GBX has helped investors access and manage physical precious metals. Founded in 2002, the company operates as a private bullion banker, providing clients with direct ownership of gold and silver alongside custodial, storage, delivery, and financing services. Unlike exchange-traded products, Neptune-GBX's offering focuses on direct ownership of physical metals, giving investors another option for portfolio diversification.

As interest in alternative assets continued to grow among financial advisors and their clients, Neptune-GBX recognized a significant opportunity: helping advisors incorporate physical precious metals into the same technology ecosystems they use to manage and report on client portfolios.

The Challenge: Bringing Physical Precious Metals into Advisor Workflows

While advisors could purchase and hold physical precious metals for clients, those positions often existed outside the portfolio management and reporting systems advisors rely on every day. That made it difficult to view precious metals alongside traditional holdings such as equities and fixed income investments.

Neptune-GBX saw an opportunity to help advisors incorporate direct ownership of precious metals into broader wealth management strategies. To do that successfully, however, advisors needed visibility into those holdings within the same systems they used to oversee client portfolios and generate reports.

“We knew there was a large opportunity to serve advisors, but to do that effectively, those positions needed to be visible within the software advisors use to run their businesses.”

Building a Scalable Growth Strategy

As Neptune-GBX expanded its relationships with advisory firms, the company encountered another challenge: every advisor seemed to use a different technology platform. Some firms operated on Orion, while others used Tamarac, Advyzon, Black Diamond, or other solutions.

Neptune-GBX explored direct integrations, but it quickly became clear that managing and maintaining multiple platform connections would require significant resources and ongoing development work.

The company needed a more efficient way to scale access to advisor platforms without adding unnecessary operational complexity.

The Solution: One Connection, Broad Distribution

That's what led Neptune-GBX to Morningstar's ByAllAccounts Data Integration Service. Instead of building and maintaining integrations one at a time, Neptune-GBX could connect once and leverage an established network that reaches a large portion of the RIA marketplace.

For Neptune-GBX, ByAllAccounts became more than an integration provider. It became a distribution channel that could help the company expand its reach while allowing internal teams to remain focused on serving clients and supporting the precious metals market.

"We looked at it logically and asked ourselves whether we wanted to build connections one at a time or work with a single partner that already had relationships across the platforms we wanted to reach," said Chris. "ByAllAccounts gave us the ability to focus on our business while leveraging a broader distribution network."

Trusted Across the Advisor Ecosystem

In addition to simplifying connectivity, Neptune-GBX believed that working with a recognized name in advisor technology would help accelerate adoption.

Because many firms already knew and trusted ByAllAccounts, conversations with advisors became easier. Rather than introducing a custom integration model, Neptune-GBX could point prospective partners to an established network already familiar to many wealth management firms.

"One of the biggest advantages is that advisors already know and trust the ByAllAccounts network," said Chris Blasi. "It removes a lot of friction from the conversation because firms are already familiar with the platform and understand how it fits into their technology environment."

The Results: A Smooth Onboarding Experience

Once implementation began, Neptune-GBX worked closely with the ByAllAccounts team to establish connectivity and prepare for advisor adoption. The project brought together Neptune-GBX's developers, its IT leadership team, and ByAllAccounts specialists to ensure a successful rollout.

According to Neptune-GBX, responsiveness and communication stood out throughout the onboarding process. Questions were addressed quickly and milestones were completed on or ahead of communicated timelines.

"The team was incredibly responsive throughout the process. Everyone was easy to work with, communication was consistent, and the project moved forward smoothly from beginning to end," said Chris.

The experience allowed Neptune-GBX's leadership team to stay focused on strategic priorities rather than managing technical escalations or project delays.

"My team never had to come to me asking for intervention because something wasn't moving forward. That's exactly what you want in a partner. The process worked the way it should."

Looking Ahead

Today, Neptune-GBX is positioned to deliver precious metals data directly into advisor-facing platforms, helping advisors incorporate physical gold and silver holdings into a more complete view of client portfolios.

As adoption grows, the company expects its relationship with ByAllAccounts to continue supporting expansion into new advisor channels while minimizing the burden of maintaining multiple platform integrations.

"ByAllAccounts gives us a scalable way to reach advisor platforms while allowing our team to stay focused on what we do best. It's a solution that helps us grow without adding unnecessary complexity," said Chris.

As demand for alternative investments continues to evolve, Neptune-GBX is building a foundation that makes physical precious metals easier for advisors to access, manage, and report on, with support from the ByAllAccounts data aggregation network.

See ByAllAccounts for Yourself

Learn how [ByAllAccounts](#) helps wealth managers support scalable growth and prioritize clients.

Chris Blasi and Neptune-GBX have not received any cash or non-cash compensation from Morningstar, directly or indirectly, in exchange for this client success story.