

About Trader ii

Trader ii software was originally developed in the 1980s as a DOS-based program by Peter B. Macdonald of Burnaby, B.C. In 1988 Claire Copp, the founder and President of Securities Services, came across the DOS program and started a business providing clients with securities accounting reports for tax purposes and filing insider reports for principals of public companies.

Securities Services clients who are Insiders of Public companies with insider filing requirements, benefit from the use of the Trader ii software as we are able to balance their insider reports to known holdings.

In the 1990s significant upgrades were made to the program to make data entry and retrieval more efficient. Given the limitations of the earlier DOS based program, a coding system was developed to keep track of securities having various tax consequences. Clients experience the benefits of this coding system through the ability to track specific historical information quickly and accurately.

In 2008, significant improvements were made and the process began to upgrade Trader ii from a DOS based program to the current online version. The result is a fast and logical program that anyone can use to keep track of their securities.

Trader ii software works for individuals, accountants and other tax preparers wanting to handle their own or their clients securities accounting. It continues to be the software used by Securities Services to provide full service securities accounting services to their clients, including individuals and third-party contracts to accounting firms.