

Financial AdvisorTech Solutions Map

RISK TOLERANCE riskalyze, FinaMetrica, STRATIFI, TOLERISK, DataPoints, finmason, Capital Preferences, Morningstar Global Risk Model, Pocket Risk, TIFIN Risk, RISKPRO, ATA RiskStation, ONPOINTE		ADVISORY FEE BILLING BILLFIN, BaySys, bill.com, AdvisorBOB, AdvicePay, SMARTKX		CLIENT SURVEY/ FEEDBACK Client Insights, NEXA		PROPOSAL GENERATION ADVISORYWORLD, invyzia, 401(K) PROPOSALS, PlanPro, Fiduciary Works		PERFORMANCE REPORTING POWERADVISOR LLC, Lifeworks, Money Quotient, Financial DNA, DataPoints, ATLAS POINT, RCL Advisor, INVESTING YOU, FINANCIAL ADVISOR ALLY, TIFIN Personality, AndesHealth Technologies, LIFE STAGE INSIGHTS™	
BUSINESS INTELLIGENCE/METRICS 3Xequity, AdvisorClarity, trulylytics		DIGITAL ONBOARDING Charles Schwab, SIGFIG, eQuit, AdvisorEngine, Marstone, HARVEST, FusionIQ, ETNA, Bitsy, Nest Wealth, OnBord		MANAGED SERVICE PROVIDERS FCI, TRUE NORTH NETWORKS, itegria, RIGHTSIZE SOLUTIONS, workplace, FUSIONNETIX		SPECIALIZED PLANNING RETIREMENT: RA, MAXIMIZEmy SOCIAL SECURITY, Social Security TIMING, INCOME SOLVER, Bucket Bliss, Wealth2k, SSANALYZER, INCOMELAB, INCOMECONDUCTOR, timeline, theBigPicture, AnnuityCheck, JOURNEYGUIDE			
INVESTMENT DATA/ANALYTICS Morningstar, YCHARTS, Fi360, REFINITIV, PORTFOLIO VISUALIZER, kwant, KOYFIN, eVestech		PORTFOLIO MANAGEMENT CIRCLE BLACK, SMARTX, Profile, Pontera, CANVAS, TradingFront, OBJECTWAY, CLSAUTOPILOT, riskalyze, AssetBook		FINANCIAL PLANNING eMoney, ENVESTNET MoneyGuide, RIGHTCAPITAL, moneytree, PR Profiles, WEALTHCARE, MAXIFI, NaviPlan, voyant, inStream, CHESHIRE SOFTWARE, Plan tech Hub		ESTATE: Leimberg, LeClair, Lackner, Inc., Brentmark, ASSURANT, Vanilla, Yourefolio LEGACY: LifeSite, everplans, LegacyShield, wishlife, everpresent TAX: Bloomberg BNA, myStockOptions.com, StockOpter, Tax Software, Inc., PLANNER CS, TaxCast, holistiplan			
STRESS TESTING MacroRisk ANALYTICS, Dimensional, RiXtrema, HiddenLevers		ALL-IN-ONE INVESTNET Tamarac, ORION, panmix, FinFolio, Morningstar Office, ADDEPAR, Black Diamond, intelinfo portfolio, MYVEST, investcloud, INDATA, Advisor360, Vestmark		SOCIAL MEDIA ARCHIVING globalRELAY, smarsh, Pagefreezer, MESSAGE WATCHER, MyRepChat, erado, REDTAIL, results		STUDENT LOAN: EFC PLUS, PAY FOR ED, CFS, CSLA TECH, Student Loan Eliminator, payoff, College Aid Pro OTHER: Special Needs Map, healthcare planning, Flourish, 765, MAX, AVANTE, CFM, GENIVITY, Healthpilot			
FORMS MANAGEMENT agreement EXPRESS, QUIK!, IPIPELINE LASER APP, conea		CRM REDTAIL, salesforce, Wealthbox, ProTracker, AdvisorEngine, equisoft, SmartOffice, ENVESTNET Tamarac, XLR8, Practifi, Skience, SS&C, APPECROWN, WEALTHCONNECT, ADVENT		PLAN MONITORING MyPlanMap, knudge HUBLY		COMPLIANCE RIA in a Box, RegEd, RED OAK Compliance Solutions, PATRINA, ComplianceMAX™, FILE 13F, SmartRIA, joot			
DIGITAL MARKETING SNAPPY KRACKEN, advisorstream, Veriday, fmg suite, hearsay, SEISMIC, Broadridge, gainfully, FMEx, Lead Pilot, clout, ADVISOR PERSPECTIVES, seven group, REACH STACK, cobutler, cental one, RETIREMENT PLAN MARKETING		ADVISOR LEAD GEN smartasset, wealthtender, FEE-ONLY NETWORK, MyPerfect Financial Advisor, HARNES WEALTH, Lasso, WISERADVISOR, INVESTMENT FIRMS, Wealthramp, Advice Chaser, planswell, indyfin, ZOE, Finny		BUSINESS SYSTEMS SUPPORT conea, benjamin, ForwardLane		CLIENT DATA GATHERING Precise FP, LifeArcPlan, Anvil			
ACCOUNT AGGREGATION ALBRIDGE, ENVESTNET Yodlee, ByAllAccounts, PLAID, eMoney, Broadridge, Aquamulate		CLIENT PORTAL WEALTH ACCESS, CIRCLE BLACK, SUMMITAS, eMoney, KUBERA, investcloud		CLIENT FILE SHARING FutureVault, box, Dropbox, ShareFile, EGN*TE, ComConnect, SIDEDRAWER		SCHEDULE APPS you can book me, calendly, EngageWare, ScheduleOnce, Acuity SCHEDULING			
CLIENT PORTAL DocuSign, RightSignature, Adobe Sign, HELLOSIGN		CLIENT NOTE TAKING MobileAssistant, SPEAKWRITE, Copytalk, PULSE360		DOCUMENT MANAGEMENT Docupace, Worldox, netdocuments, eFileCabinet, Laserfiche		E-SIGNATURE DocuSign, RightSignature, Adobe Sign, HELLOSIGN			