

# Financial AdvisorTech Solutions Map

<b>RISK TOLERANCE</b> riskalyze, FinaMetrica, STRATIFI, TOLERISK, DataPoints, finmason, Capital Preferences, Morningstar Global Risk Model, Pocket Risk, TIFIN Risk, RISKPRO, ATARiskStation, ONPOINTE	<b>ADVISORY FEE BILLING</b> BILLFIN, BavSys, bill.com, AdvisorBOB, AdvicePay, SMARTKX	<b>CLIENT SURVEY/ FEEDBACK</b> Client Insights, NEXA	<b>PROPOSAL GENERATION</b> ADVISORYWORLD, capintel, VRGL, invyza, 401(K) PROPOSALS, PLANPRO, Fiduciary Works	<b>PERFORMANCE REPORTING</b> ALBRIDGE, blueleaf, Lifeworks, Schwab Advisor Portfolio Connect, FIRSTRATE, POWERADVISOR LLC, Broadridge	<b>BEHAVIOR ASSESSMENTS</b> Money Quotient, Financial DNA, DataPoints, ATLAS POINT, wealthfully, ROL Advisor, INVESTING YOU, FINANCIAL ADVISOR ALLY, TIFIN Personality, AndesWealth Technologies, LIFE STAGE INSIGHTS, Unitifi
<b>BUSINESS INTELLIGENCE/METRICS</b> 3Xequity, AdvisorClarity, trueyltycs	<b>PORTFOLIO MANAGEMENT</b> CIRCLE BLACK, SMARtX, Profile Software, CANVAS, TradingFront, OBJECTWAY, intelliflo, portfolio, riskalyze, AssetBook, FINARTIS, investcloud, FIS, INVESTEDGE, Fitek, Charles River, ndexsystems, COMARCH	<b>DIGITAL ONBOARDING</b> Marstone, HARVEST, AdvisorEngine, SIGFIG, eQuit, FusionIQ, ETNA, Bitsy, Nest Wealth, OnBord	<b>MANAGED SERVICE PROVIDERS</b> TRUE NORTH NETWORKS, RIGHTSIZE SOLUTIONS, wht, FCI, workplace, itegria, FUSIONNETIX	<b>SPECIALIZED PLANNING</b> RETIREMENT: RA, MAXIMIZE my SOCIAL SECURITY, Social Security TRAINING, Wealth2K, SSANALYZER, INCOME SOLVER, Bucket Bliss, INCOMECONDUCTOR, timeline, theBigPicture, Annuity Check, JOURNEYGUIDE, INCOMELAB ESTATE: Leimberg, LeClair, Lackner, Inc., Brentmark, ASSURANT, Executor Assist, Vanilla, Yourfolio LEGACY: LifeSite, everplans, LegacyShield, wishlife, everpresent TAX: Bloomberg BNA, myStockOptions.com, corvee, StockOpter, CFS Tax Software, Inc., PLANNER CS, TaxCast, holistiplan STUDENT LOAN: EFC PLUS, PAY ED, CFS, CSLA TECH, Student Loan Eliminator, payoff, College Aid Pro	
<b>INVESTMENT DATA/ANALYTICS</b> Morningstar, YCHARTS, Fi360, REFINITIV, PORTFOLIO VISUALIZER, kwant, koyfin, eVestech, Bloomberg Terminal, CFRA, FACTSET, Nasdaq, Zephyr, BlackRock Advisor Center, Aladdin, BITA, CHAIKIN, ADVISORYWORLD, Windham Labs, portfoliodesigner, BLUE VAULT, TREND RATING, TELEMET, magnifi, factorE, indexone, LOGICLY, finmason, Portformer, ESC/SRI, CLARITY AI, ethos, ACT ANALYTICS, YourStake	<b>ALL-IN-ONE</b> ENVESTNET Tamarac, Advyzon, Orion, Morningstar Office, Black Diamond, ADDEPAR, MYVEST, investcloud, INDATA, Advisor360, Vestmark	<b>FINANCIAL PLANNING</b> eMoney, ENVESTNET MoneyGuide, RightCapital, moneytree, PR Profiles, W, WEALTHCARE, MAXIFI, NaviPlan, voyant, inStream, CHESHIRE SOFTWARE, Plan tech Hub, wealthtrace, Elements	<b>FINANCIAL PLANNING (cont.)</b> @advisys, Morningstar GOAL BRIDGE, Savology, TIFIN Plan	<b>PLANNING LIGHT</b> @advisys, Morningstar GOAL BRIDGE, Savology, TIFIN Plan	
<b>STRESS TESTING</b> MacroRisk Analytics, Dimensional, RiXtrema, HiddenLevers, ONPOINTE, finmason, FABRIC	<b>REBALANCING ONLY</b> iRebal, Smartleaf, 55ip, FLYER, BlazePortfolio, REDBLACK, SOFTPAK, REFINITIV, Rowboat Advisors, LIFEYIELD, AdvisorPeak	<b>CUSTOMODIAL PLATFORM</b> RBC, SHAREHOLDERS SERVICE GROUP, Charles Schwab, sel	<b>SOCIAL MEDIA ARCHIVING</b> globalRELAY, smارش, Pagefreezer, MESSAGE WATCHER, MyRepChat, erado, REDTAIL, results	<b>CASH MANAGEMENT</b> MAX, Flourish, advisor.cash <b>HEALTHCARE/MEDICARE</b> 765, AVANTE, Healthpilot, healthcare planning <b>OTHER</b> Special Needs Map, CFM, GENIVITY, REAL ESTATE FINANCIAL PLANNER, Onramp, HOPE TRUST, giveback	
<b>FORMS MANAGEMENT</b> agreement EXPRESS, QUIK!, IPIPELINE, conga	<b>CRM</b> REDTAIL, salesforce, Wealthbox, ProTracker Software, ugru, GORILLA 5, Advyzon, NEXJ, INVESTNET Tamarac, SmartOffice, AdvisorEngine, Practifi, equisoft, Microsoft Dynamics 365, Less Annoying CRM, WEALTHCONNECT, XLR8, Skience, redcapture	<b>ADVISOR LEAD GEN</b> smartasset, wealthtender, FEE ONLY NETWORK, MyPerfect Financial Advisor, HARNES WEALTH, Lasso, WISERADVISOR, INVESTMENT FIRMS, ZOE, planswell, Advice Chaser, Wealthramp, indyfin, Finny	<b>PLAN MONITORING</b> MyPlanMap, knudge HUBLY	<b>COMPLIANCE</b> RIA in a Box, RegEd, RED OAK Compliance Solutions, PATRINA, ComplianceMAX™, ForesideConnect, Investorcom, joot, SmartRIA, FILE 13F	
<b>DIGITAL MARKETING</b> SMAPPY KRÄKEN, advisorstream, Veriday, fmg suite, hearsay, FMeX, Seismic, Broadridge, gainfully, CLEARNOMICS, MarketDesk, REACH STACK, TIFIN Wealth, AP PREMIUM, CATCHLIGHT, RETIREMENT PLAN MARKETING, cental one, Advisor I/O, Hyperchat, Social, Lead Pilot, cobutler	<b>ACCOUNT AGGREGATION</b> ALBRIDGE, ENVESTNET Yodlee, ByAllAccounts, PLAID, eMoney, Broadridge, Aquilulate	<b>CLIENT PORTAL</b> WEALTH ACCESS, CIRCLE BLACK, eMoney, SUMMITAS	<b>BUSINESS SYSTEMS SUPPORT</b> conga, benjamin ForwardLane	<b>CLIENT DATA GATHERING</b> Precise FP, LifeArcPlan, Anvil	
<b>CLIENT FILE SHARING</b> Futurevault, box, Dropbox, ShareFile, EGNYTE, ComConnect, SIDEDRAWER	<b>SCHEDULE APPS</b> you can book me, calendly, Engage ware, ScheduleOnce, Acuity SCHEDULING	<b>E-SIGNATURE</b> DocuSign, RightSignature, Adobe Sign, HELLOSIGN	<b>CLIENT MEETING SUPPORT</b> MobileAssistant, Copytalk, SPEAKWRITE, econiq, PULSE360	<b>DOCUMENT MANAGEMENT</b> Docupace, Worldox, netdocuments, Paperclip, eFileCabinet, Laserfiche	