Tech Resources

Tiffany Charles
Destiny Capital & Entrepreneur Aligned

Providing a Financial Self-Assessment to Clients To Make Value More Tangible

pointerpro
Formerly Survey Anyplace

Google Forms

PowerPoint

Kyle Moore
Quarry Hill Advisors

Implementing an Annual Service Process To Consistently Demonstrate Value During Ongoing Review Meetings

RightCapital

holistiplan

Google Sheets

Jake Northrup
Experience Your Wealth LLC

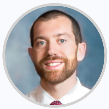
Using a Client-Facing Task Manager To Help Recommendations Get Implemented

eMoney

Wealthbox

meister task

Tech Resources



Michael Whitman

Millennium Planning Group, LLC

Automating Value-Added Client Communications Throughout the Year by Weaving Together Out-of-the-Box Tech

Snappy Kraken

fpPathfinder

Pulse360™

Wealthbox

Jason Pereira

Woodgate Financial

Building a (Modularized) Financial Planning Pitchbook To Better Convey the Value of Financial Planning to Prospects

eStatePlanner by Hull & Hull LLP

PowerPoint

Carolyn McClanahan

Life Planning Partners, Inc.

Creating Client Engagement Standards To Set Service Expectations and Attract the Right Prospects

Word