

Financial AdvisorTech Solutions Map

RISK TOLERANCE riskalyze, FinaMetrica, STRATIFI, TOLERISK, DataPoints, finmason, Capital Preferences, Morningstar Global Risk Model, Pocket Risk, TIFIN Risk, RISKPRO, ATARiskStation, ONPOINTE	ADVISORY FEE BILLING BILLFIN, BavSys, bill.com, AdvisorBOB, AdvicePay, SMARTKX	CLIENT SURVEY/ FEEDBACK Client Insights, NEXA	PROPOSAL GENERATION invyza, capintel, 401(K) PROPOSALS, VRGL, equisoft/analyze, PLANPRO, ADVISORY WORLD, Fiduciary Works	PERFORMANCE REPORTING FIRST RATE, Schwab Advisor Portfolio Connect™, ALBRIDGE, AssetBook, POWERADVISOR LLC, Broadridge	BEHAVIOR ASSESSMENTS Money Quotient, Financial DNA, INVESTING YOU, FINANCIAL ADVISOR ALLY, TIFIN Personality, SHAPING WEALTH, Qualitate, LIFE STAGE INSIGHTS™, Unitifi, AndesHealth
BUSINESS INTELLIGENCE/METRICS 3Xequity, AdvisorClarity, trueylitics	PORTFOLIO MANAGEMENT CIRCLE BLACK, SMARTX, riskalyze, intelliflo, office, Profile, OBJECTWAY, FINARTIS, FIS, Charles River, INVESTEDGE, Fitek, ndexsystems, COMARCH, Capitect, ALTEXCHANGE, Libretto, Emotomy, Pontera, d1g1t, amplify	DIGITAL ONBOARDING SIGFIG, FusionIQ, ETNA, AdvisorEngine, Marstone, Nest Wealth, OnBord	MANAGED SERVICE PROVIDERS CLOUDSCALE 365, itegria, CYBERSECURITY, Visory, workplace, FCI, FUSIONNETIX, wht, AdvisorArmor	SPECIALIZED PLANNING RETIREMENT: MAXIMIZE MY SOCIAL SECURITY, Wealth2K, SSANALYZER, INCOME SOLVER, Bucket Bliss, Savvy Social Security Planning, INCOME CONDUCTOR, timeline, theBigPicture, AnnuityCheck, JOURNEYSGUIDE, INCOMELAB ESTATE: Brentmark, LifeSite, everplans, LegacyShield LEGACY: Helen's Plan, prisma, everpresent, Trustworthy. TAX: Bloomberg BNA, myStockOptions.com, corvee, StockOpter, CFS Tax Software, Inc., PLANNER CS, TaxCast, holistiplan STUDENT LOAN: CFS, PAY FOR ED, CSLA TECH, Student Loan Eliminator, payitoff, College Aid Pro CASH MANAGEMENT: R&T, advisor.cash, Flourish, MAX HEALTHCARE/MEDICARE: 765, AVANTE, Healthpilot, healthcare planning OTHER: Special Needs Map, CFM, REAL ESTATE FINANCIAL PLANNER, Onramp, HOPE TRUST, giveback, Carefull, Sora, CHARITYVEST	
INVESTMENT DATA/ANALYTICS Morningstar, YCHARTS, FI360, REFINITIV, PORTFOLIO VISUALIZER, kwant, koyfin, Bloomberg Terminal, CFRA, FACTSET, BITA, Nasdaq, ZACKS AdvisorTools, Zephyr, BlackRock Aladdin, CHAIKIN, Windham Labs, ADVISORY WORLD, equisoft/fund, FeeMetri(k)s, CANOE, portfoliodesigner, BLUE VAULT, TREND RATING, TELEMET, magnifi, indexone, ALTIDAR, LOGICLY, finmason, Portformer™, ESC/SRI, CLARITY AI, ethos, ACT ANALYTICS, YourStake	REBALANCING ONLY Smartleaf, intelliflo, redblack, FLYER	ALL-IN-ONE ENVESTNET Tamarac, Advzyon, Orion, Morningstar Office, blueleaf, Black Diamond, ADDEPAR, MYVEST, investcloud, INDATA, Advisor360, Vestmark, CUSTODIAL PLATFORM: RBC, SHAREHOLDERS SERVICE GROUP, Charles Schwab, sel, Folio Institutional, Betterment For Advisors, Ameritrade Institutional, ClientWorks, AXOS, EQUITY ADVISOR SOLUTIONS, ADVICWORKS, ASSETMARK, InteractiveBrokers, APEX Clearing™, Wealthscape, NETX360, Goldman Sachs, TradePMR, entrustody, Altruist, eQuit	FINANCIAL PLANNING eMoney, MoneyGuide, RightCapital, MAXIFI, moneytree, ExecPlan, NaviPlan, inStream, CHESHIRE SOFTWARE, WEALTHCARE, voyant, PR, wealthtrace, advisys, Savology, nebo, ProjectionLab, NewRetirement, ECF	ADVICE ENGAGEMENT ForwardLane, fpPATHFINDER, fpalpha, asset+map, visiWealth, knudge, LUMIANT, Elements, FutureVault, ShareFile, EGN*TE, ComConnect	ACCOUNT AGGREGATION ALBRIDGE, Aquamulate, Yodlee, ByAllAccounts, PLAID, eMoney, Broadridge, ARCH
INSURANCE DATA/ANALYTICS LISA, Veralytic, WINK	FORMS MANAGEMENT agreement, QUIK!, conga, PIPELINE	ADVISOR DATA WAREHOUSING SKIENCE, WEALTH ACCESS, BridgeFT, MILE MARKER	SOCIAL MEDIA ARCHIVING globalRELAY, smarsh, Pagefreezer, MyRepChat, erado, REDTAIL, MirrorWeb, results	COMPLIANCE ForesideConnect, RIA in a Box, RED OAK, ComplianceMAX™, InvestorCOM, PATRINA, FIN Compliance, RIAV, FILE 13F, LA MEER INC., RegEd, joot, SmartRIA	CLIENT PORTAL CIRCLE BLACK, eMoney, SUMMITAS, eVestech, KUBERA, Financial
STRESS TESTING MacroRisk ANALYTICS, Dimensional, RiXtrema, HiddenLevers, ONPOINTE, finmason, FABRIC	401(K) IMPLEMENTATION Betterment, Vestwell, FIDUCIARYSHIELD	CRM REDTAIL, salesforce, Wealthbox, ProTracker Software, ugru, GORILLA 5, equisoft, NEXJ, Advzyon, ENVESTNET Tamarac, SmartOffice, AdvisorEngine, Microsoft Dynamics 365, Less Annoying CRM, AdvAlly, CRM OVERLAYS: shellblack, XLR8, SS&C, APPROVIN, WEALTHCONNECT, Practifi, SKIENCE, Salentica, recapture	CLIENT MEETING SUPPORT MobileAssistant, Copytalk, SPEAKWRITE, coniq, PULSE360	CLIENT FILE SHARING FutureVault, ShareFile, Dropbox, EGN*TE, ComConnect	SCHEDULE APPS you can book me, calendly, EngageWare, ScheduleOnce, Acuity SCHEDULING
DIGITAL MARKETING SHAPY KRÄKEN, advisorstream, Veriday, denimsocial, TIFIN Cloud, fmg suite, hearsay, FMEx, CLEARNOMICS, gainfully, RWM, Seismic, Broadridge, MarketDesk, AP+ PREMIUM, REACH STACK, CATCHLIGHT, RETIREMENT PLAN MARKETING, cobutler, WealthVoice	ADVISOR LEAD GEN FEE+ONLY, WISERADVISOR, RAMSEY, indyfin, planswell, smartasset, Financial Advisors, MyaiPerfect, datallign, Lasso, ADVISORFINDER, Advice Chaser, wealthtender, Wealthramp, INVESTMENT FIRMS	WORKFLOW SUPPORT conga, Docupace, COGNICOR, ABSOLUTE ENGAGEMENT, finpace, HUBLY, ADVISOR TOUCH	CLIENT DATA GATHERING Precise, LifeArcPlan, TOUCHSTONE PATHWAY, Anvil	DOCUMENT MANAGEMENT Worldox, Laserfiche, Paperclip, eFileCabinet, netdocuments	E-SIGNATURE DocuSign, RightSignature, Adobe Sign, HELLOSIGN