

Financial AdvisorTech Solutions Map

RISK TOLERANCE FinaMetrica, Pocket Risk, STRATIFI, TOLERISK, DataPoints, finmason, RISKPRO, Morningstar Global Risk Model, CapitalPreferences, TIFIN Risk, ATA RiskStation, ONPOINTE Risk Analyst	ADVISORY FEE BILLING BILLFIN, BavSys, bill.com, AdvisorBOB, AdvicePay, SMARTKX	CLIENT SURVEY/ FEEDBACK Client Insights, NEXA, Nitrogen, Advisory World, PLANPRO, Fiduciary Works	SALES ENABLEMENT V R G L, Invyza, D capintel, 401(K) PROPOSALS, Elements, equisoft/analyze, PLANPRO, Nitrogen, 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, Andes Wealth Technologies
BUSINESS INTELLIGENCE/METRICS 3Xequity, Advisor Clarity, truelytics	PORTFOLIO MANAGEMENT CIRCLE BLACK, intelligiflo, office, SmartX, Profile, OBJECTWAY, FINARTIS, FIS, Charles River, INVESTEDGE, Fitek, ndexsystems, COMARCH	DIGITAL ONBOARDING SIGFIG, FusionIQ, ETNA, Nest Wealth, OnBord, AdvisorEngine, Marstone	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, prismatic, everpresent, Trustworthy. TAX: Bloomberg BNA, myStockOptions.com, corvee, StockOpter, CFS Tax Software, Inc., PLANNER CS, TaxCast, holistiplan EDUCATION: 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, caribou, HealthView OTHER: Special Needs Map, CFM, REAL ESTATE FINANCIAL PLANNER, Onramp, HOPE TRUST, giveback, Carefull, Sora, CHARITYVEST, optivice	
INVESTMENT DATA/ANALYTICS Morningstar, YCHARTS, FI360, REFINITIV, PORTFOLIO VISUALIZER, kwant, koyfin, Bloomberg Terminal, CFRA, FACTSET, BITA, Nasdaq, AdvisorTools, Zephyr, BlackRock Aladdin, CHAIKIN, Windham Labs, ADVISORY WORLD, INVESTORPRO, bondIT, 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, intelligiflo, redblack, FLYER	ALL-IN-ONE INVESTNET Tamarac, Advyzon, parafinix, FinFolio, Black Diamond, Morningstar Office, ORION, blueleaf, ADDEPAR, dtgit, MYVEST, investcloud, INDATA, Advisor360, Vestmark, CUSTODIAL PLATFORM: RBC, SHAREHOLDERS SERVICE GROUP, Charles Schwab, sel, Folio Institutional, Betterment For Advisors, Ameritrade Institutional, AXOS, EQUITY ADVISOR SOLUTIONS, Altruist eQuipt, ADVICEWORKS, InteractiveBrokers, ASSETMARK, ClientWorks, Wealthscape, NETX360, Goldman Sachs, RAYMOND JAMES, TradePMR, entrustody, APEX Clearing	FINANCIAL PLANNING eMoney, MoneyGuide, RightCapital, MAXIFI, moneytree, ExecPlan, NaviPlan, inStream, CHESHIRE SOFTWARE, WEALTHCARE, voyant, PR, wealthtrace, advisys, Savology, nebo, by GMO, Morningstar Goal Bridge, Caravel Concepts, TIFIN Plan, ProjectionLab, NewRetirement, ECF	COMMUNICATIONS ARCHIVING globalRELAY, smarsh, Pagefreezer, MyRepChat, erado, REDTAIL, MirrorWeb, results	
INSURANCE DATA/ANALYTICS LISA, Veralytic, WINK	ADVISOR DATA WAREHOUSING SKIENCE, WEALTH ACCESS, BridgeFT, MILE MARKER	ADVISOR DATA WAREHOUSING SKIENCE, WEALTH ACCESS, BridgeFT, MILE MARKER	COMPLIANCE ForesideConnect, RIA in a Box, RED OAK, ComplianceMAX™, InvestorCOM, PATRINA, FIN Compliance, RIA, FILE 13F, LA MEER INC., RegEd, joot, SmartRIA	CLIENT MEETING SUPPORT MobileAssistant, Copytalk, SPEAKWRITE, coniq, PULSE360	ADVICE ENGAGEMENT ForwardLane, fpPATHFINDER, fpalpha, asset+map, CurrentClient, knudge, LUMIANT, visiWealth, BENTO ENGINE
STRESS TESTING MacroRisk Analytics, Dimensional, RiXtrema, HiddenLevers, ONPOINTE Risk Analyst, finmason, FABRIC	FORMS MANAGEMENT agreement PRESS, QUIK!, conra, PIPELINE	CRM REDTAIL, salesforce, Wealthbox, ProTracker Software, ugru, GORILLA 5, equisoft, NEXJ, Advyzon, INVESTNET Tamarac, SmartOffice, AdvisorEngine, Microsoft Dynamics 365, Less Annoying CRM, AdvAlly, CRM OVERLAYS: shellblack, XLRS, SS&C, APPROWIN, WEALTHCONNECT, Practifi, SKIENCE, Salentica, recapture	CLIENT MEETING SUPPORT MobileAssistant, Copytalk, SPEAKWRITE, coniq, PULSE360	CLIENT FILE SHARING FutureVault, ShareFile, EGN*TE, box, ComConnect, Dropbox, you can book me, Engage ware, GReminders, Acuity SCHEDULING, Calendly, ScheduleOnce	
DIGITAL MARKETING SHAPPY KRAKEN, advisorstream, Veriday, Hyperchat, social, Advisor I/O, denimsocial, TIFIN Cloud, cental one, fmg suite, hearsay, FMEx, CLEARNOMICS, gainfully, RWM, Seismic, Broadridge, MarketDesk, AP+ PREMIUM, REACH STACK, CATCHLIGHT, RETIREMENT PLAN MARKETING, cobutler, WealthVoice	401(K) IMPLEMENTATION Betterment, Vestwell, FIDUCIARYSHIELD by BAKRI	ADVISOR LEAD GEN FEE+ONLY, WISERADVISOR, RAMSEY, indyfin, planswell, smartasset, Financial Advisors, MyaiPerfect, datallign, Lasso, ADVISORFINDER, Advice Chaser, ZOE, H, wealthtender, Wealthramp, INVESTMENT FIRMS, HARNES WEALTH	WORKFLOW SUPPORT conra, Docupace, COGNICOR, ABSOLUTE ENGAGEMENT, finpace, HUBLY, ADVISOR TOUCH	DOCUMENT MANAGEMENT Worldox, Laserfiche, Paperclip, eFileCabinet, netdocuments	