

# Financial AdvisorTech Solutions Map

<b>RISK TOLERANCE</b> FinaMetrica, Pocket Risk, STRATIFI, TOLERISK, DataPoints, finmason, RISKPRO, Morningstar Global Risk Model, CapitalPreferences, TIFIN Risk, ATA RiskStation, ONPOINTE Risk Analyst	<b>ADVISORY FEE BILLING</b> BILLFIN, BillFix, BaySys, bill.com, AdvisorBOB, AdvicePay, SMARTKX	<b>CLIENT SURVEY/ FEEDBACK</b> Client Insights, NEXA	<b>SALES ENABLEMENT</b> V R G L, Invyza, D capintel, 401(K) PROPOSALS, Elements, equisoft/analyze, PLANPRO, Nitrogen, ADVISORY WORLD, Fiduciary Works	<b>PERFORMANCE REPORTING</b> FIRST RATE, Schwab Advisor Portfolio Connect™, ALBRIDGE, AssetBook, POWERADVISOR LLC, Broadridge	<b>BEHAVIOR ASSESSMENTS</b> Money Quotient, Financial DNA, INVESTING YOU, FINANCIAL ADVISOR ALLY, TIFIN Personality, SHAPING WEALTH, Qualitate, LIFE STAGE INSIGHTS™, Unitifi, AndesWealth Technologies
<b>BUSINESS INTELLIGENCE/METRICS</b> 3Xequity, AdvisorClarity, trueyltcs	<b>DIGITAL ONBOARDING</b> SIGFIG, FusionIQ, ETNA, AdvisorEngine, Marstone, Nest Wealth, OnBord	<b>MANAGED SERVICE PROVIDERS</b> CLOUDSCALE 365, itegria, CYBERSECURITY, Visory, workplace, FCI, FusionNetix, wht, AdvisorArmor	<b>SPECIALIZED PLANNING</b> RETIREMENT: RA, MAXIMIZE MY SOCIAL SECURITY, Social Security PLANNING, Wealth2k, Income Discovery, INCOME CONDUCTOR, INCOMELAB, SAvvy Social Security Planning, INCOME SOLVER, Bucket Bliss, Annuity Check, JOURNEYGUIDE, ESTATE: Brentmark, LifeSite, everplans, LegacyShield, Helen's Plan, prisma, everpresent, Trustworthy.		
<b>INVESTMENT DATA/ANALYTICS</b> Morningstar, YCHARTS, Dimensional, REFINITIV, PORTFOLIO VISUALIZER, ORTEC FINANCE, FI360, kwant, koyfin, Bloomberg Terminal, CFRA, FACTSET, BITA, Nasdaq, ZACKS 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	<b>PORTFOLIO MANAGEMENT</b> CIRCLE BLACK, intelliglo, office, SmartX, Profile, OBJECTWAY, FINARTIS, FIS, Charles River, INVESTEDGE, Fitek, ndexsystems, COMARCH, Capitect, ALTEXCHANGE, Libretto, Emotomy, Pontera, amplify, REBALANCING ONLY: Smartleaf, intelliglo, redblack, iRebal, 55ip	<b>ALL-IN-ONE</b> ENVESTNET Tamarac, Advyzon, Black Diamond, Morningstar Office, ORION, blueleaf, ADDEPAR, MYVEST, investcloud, INDATA, Advisor360, Vestmark, CUSTODIAL PLATFORM: RBC, SHAREHOLDERS SERVICE GROUP, Folio Institutional, Betterment For Advisors, AMERITRADE Institutional, AXOS, EQUITY APPROACH, Altruist eQuip, ADVICWORKS, InteractiveBrokers, ASSETMARK, ClientWorks, Wealthscape, NETX360, Goldman Sachs, RAYMOND JAMES, TradePMR, entrustody, APEX Clearing™	<b>FINANCIAL PLANNING</b> eMoney, MoneyGuide, RightCapital, MAXIFI, moneytree, ExecPlan, NaviPlan, inStream, CHESHIRE SOFTWARE, WEALTHCARE, voyant, PR, wealthtrace, PLANNING LIGHT: advisys, Savology, nebo, ProjectionLab, NewRetirement, ECF		
<b>INSURANCE DATA/ANALYTICS</b> LISA, Veralytic, WINK	<b>ADVISOR DATA WAREHOUSING</b> SKIENCE, WEALTH ACCESS, BridgeFT, MILE MARKER	<b>COMMUNICATIONS ARCHIVING</b> globalRELAY, smarsh, Pagefreezer, MyRepChat, erado, REDTAIL, MirrorWeb, results	<b>ADVICE ENGAGEMENT</b> ForwardLane, InvestSuite, CurrentClient, LUMIANT, visiWealth		
<b>STRESS TESTING</b> MacroRisk ANALYTICS, RiXtrema, HiddenLevers, ONPOINTE, finmason, FABRIC	<b>FORMS MANAGEMENT</b> agreement PRESS, QUIK!, PIPELINE, 401(K) IMPLEMENTATION: Betterment, Vestwell, FIDUCIARYSHIELD	<b>COMPLIANCE</b> ForesideConnect, RIA in a Box, RED OAK, ComplianceMAX™, InvestorCOM, PATRINA, FIN Compliance™, RIAV, FILE 13F, LA MEER INC., RegEd, joot, SmartRIA	<b>ACCOUNT AGGREGATION</b> ALBRIDGE™, Aquilulate, PLAID, InvestSuite, fp PATHFINDER, Yodlee, ByAllAccounts, blueleaf, eMoney, Broadridge, ARCH		
<b>DIGITAL MARKETING</b> SHAPPY KRACKEN, advisorstream, Veriday, fmg suite, hearsay, WEALTH I/O, CLEARNOMICS, gainfully, RWM, FMEx, HubsSpot, Seismic, Broadridge, MarketDesk, Hyperchat, denimsocial, TIFIN Cloud, REACH STACK, Lead Pilot, AP+ PREMIUM, CATCHLIGHT, cobutler, WealthVoice	<b>CRM</b> REDTAIL, salesforce, Wealthbox, ProTracker Software, ugru, GORILLA 5, equisoft, NEXJ, Advyzon, ENVESTNET Tamarac, SmartOffice, AdvisorEngine, Microsoft Dynamics 365, Less Annoying CRM, AdvAlly, CRM OVERLAYS: shellblack, XLR8, SKIENCE, SALENTICA, WEALTHCONNECT, Practifi, SKIENCE, redcapture	<b>CLIENT MEETING SUPPORT</b> MobileAssistant, Copytalk, SPEAKWRITE, PULSE360	<b>CLIENT PORTAL</b> CIRCLE BLACK, SUMMITAS, eMoney, Financial, Monarch, eVestech, KUBERA, ENTOLÉ		
<b>ADVISOR LEAD GEN</b> FEE+ONLY, WISERADVISOR, RAMSEY, indyfin, planswell, smartasset, Financial Advisors, MyaiPerfect, datallan, Lasso, ADVISORFINDER, Advice Chaser, wealthtender, Wealthramp, INVESTMENT FIRMS	<b>WORKFLOW SUPPORT</b> conea, asana, Docupace, COGNICOR, ABSOLUTE ENGAGEMENT, finpace, HUBLY, ADVISORTOUCH	<b>CLIENT DATA GATHERING</b> Precise, Jotform, LifeArcPlan, TOUCHSTONE PATHWAY	<b>SCHEDULE APPS</b> Acuity SCHEDULING, Bookings, Engage ware, GReminders, ScheduleOnce, Calendly, you can book me		
	<b>DOCUMENT MANAGEMENT</b> Worldox, Laserfiche, eFileCabinet, Paperclip, Finity360, netdocuments	<b>E-SIGNATURE</b> DocuSign, RightSignature, Adobe Sign, HELLOSIGN			