

FINANCIAL PLANNING

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PLANNING LIGHT



SPECIALIZED PLANNING

RETIREMENT



ESTATE



LEGACY



TAX



EQUITY COMP



EDUCATION



CASH MANAGEMENT



HEALTHCARE/MEDICARE



OTHER



INSURANCE INTELLIGENCE/METRICS



INVESTMENT MANAGEMENT

PORTFOLIO MANAGEMENT



REBALANCING ONLY



ALL-IN-ONE



CUSTODIAL PLATFORM



INVESTMENT DATA/ANALYTICS



ESG/SRI



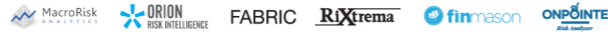
PERFORMANCE REPORTING



RISK TOLERANCE



STRESS TESTING



ACCOUNT AGGREGATION



DIGITAL ONBOARDING



Financial AdvisorTech Solutions Map

OCTOBER 2023

Latest version available at: kitces.com/fintechmap

= Category Newcomer

= Enterprise

CLIENT ENGAGEMENT

CLIENT MEETING SUPPORT



CLIENT DATA GATHERING



CLIENT SURVEY/ FEEDBACK



BEHAVIOR ASSESSMENTS



ADVICE ENGAGEMENT



CLIENT PORTAL



SCHEDULE APPS



BUSINESS DEVELOPMENT

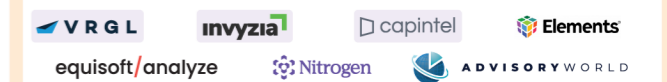
DIGITAL MARKETING



ADVISOR LEAD GEN



SALES ENABLEMENT



401(K) PROPOSALS



OPERATIONS

MANAGED SERVICE PROVIDERS



CYBERSECURITY



COMPLIANCE



BUSINESS INTELLIGENCE/METRICS



DOCUMENT MANAGEMENT



FORMS MANAGEMENT



ADVISOR DATA WAREHOUSING



E-SIGNATURE



CRM



ADVISORY FEE BILLING



CLIENT FILE SHARING



WORKFLOW SUPPORT

