

Financial AdvisorTech Solutions Map

MAY 2024

Latest version available at: kitces.com/fintechmap

FINANCIAL PLANNING

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PLANNING LIGHT



SPECIALIZED PLANNING

RETIREMENT



ESTATE



LEGACY



TAX



EQUITY COMP

EDUCATION



CASH MANAGEMENT

CASH FLOW AUTOMATION



HEALTHCARE/MEDICARE



BUSINESS VALUATION

BIZ EQUITY

OTHER

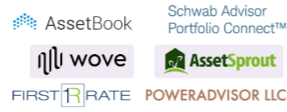


INSURANCE INTELLIGENCE/METRICS



INVESTMENT MANAGEMENT

PERFORMANCE REPORTING



TRADING/REBALANCING



PORTFOLIO MANAGEMENT



HELD-AWAY ASSETS



CUSTODIAL PLATFORM



INVESTMENT DATA/ANALYTICS



ESG/SRI



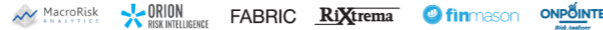
401(K) IMPLEMENTATION



RISK TOLERANCE



STRESS TESTING



ACCOUNT AGGREGATION



DIGITAL ONBOARDING



CLIENT ENGAGEMENT

CLIENT MEETING SUPPORT



AI ASSISTANT



CLIENT FEEDBACK



CLIENT DATA GATHERING



BEHAVIOR ASSESSMENTS



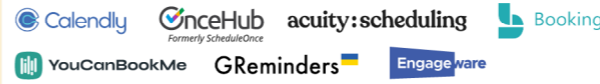
ADVICE ENGAGEMENT



CLIENT PORTAL



SCHEDULE APPS



OPERATIONS

CRM



CRM OVERLAYS



ADVISORY FEE BILLING



COMPLIANCE



MANAGED SERVICE PROVIDERS



BUSINESS DEVELOPMENT

PROSPECTING



ADVISOR LEAD GEN



DIGITAL MARKETING



SALES ENABLEMENT



DOCUMENT MANAGEMENT



ADVISOR DATA WAREHOUSING



E-SIGNATURE



CLIENT FILE SHARING



WORKFLOW SUPPORT

COMMUNICATIONS ARCHIVING



BUSINESS INTELLIGENCE/METRICS

