

# Financial AdvisorTech Solutions Map

<b>RISK TOLERANCE</b> riskalyze, FinaMetrica, STRATIFI, TOLERISK, DataPoints, finmason, Capital Preferences, Morningstar Global Risk Model, Pocket Risk, TIFIN Risk, RISKPRO, ATA RiskStation, ONPOINTE	<b>ADVISORY FEE BILLING</b> BILLFIN, BavSys, bill.com, AdvisorBOB, AdvicePay, SMARTKX	<b>CLIENT SURVEY/ FEEDBACK</b> Client Insights, NEXA	<b>PROPOSAL GENERATION</b> invyza, capintel, 401(K) PROPOSALS, V R G L, equisoft/analyze, PLANPRO, ADVISORY WORLD, Fiduciary Works	<b>PERFORMANCE REPORTING</b> ALBRIDGE, AssetBook, Lifeworks, Schwab Advisor Portfolio Connect, FIRST RATE, Broadridge, POWERADVISOR LLC	<b>BEHAVIOR ASSESSMENTS</b> Money Quotient, Financial DNA, INVESTING YOU, FINANCIAL ADVISOR ALLY, TIFIN Personality, SHAPING WEALTH, LEGACY, LIFE STAGE INSIGHTS, Unitifi, ROL Advisor, Andes Wealth Technologies
<b>BUSINESS INTELLIGENCE/METRICS</b> 3Xequity, AdvisorClarity, trueylitics	<b>PORTFOLIO MANAGEMENT</b> CIRCLE BLACK, SMARTX, Profile, riskalyze, intelliflo, portfolio, CANVAS, OBJECTWAY, FINARTIS, investcloud, FIS, INVESTEDGE, Fitek, Charles River, ndexsystems, COMARCH	<b>DIGITAL ONBOARDING</b> SIGFIG, FusionIQ, ETNA, AdvisorEngine, Marstone, Nest Wealth, OnBord	<b>ALL-IN-ONE</b> ENVESTNET Tamarac, Advyzon, paragonmix, FinFolio, ORION, Morningstar Office, blueleaf, Black Diamond, ADDEPAR, MYVEST, investcloud, INDATA, Advisor360, Vestmark	<b>MANAGED SERVICE PROVIDERS</b> FCI, workplace, Visory, itegria, wht, FUSIONNETIX	<b>SPECIALIZED PLANNING</b> RETIREMENT: MAXIMIZE MY SOCIAL SECURITY, Wealth2K, SSANALYZER, INCOME SOLVER, Bucket Bliss, Savvy Social Security Planning, INCOME CONDUCTOR, timeline, theBigPicture, Annuity Check, JOURNEYGUIDE, INCOMELAB ESTATE: Leimberg, LeClair, Lackner, Inc., Brentmark, Vanilla, Yourfolio LEGACY: LifeSite, everplans, LegacyShield, Helen's Plan, everpresent TAX: Bloomberg BNA, myStockOptions.com, corvee, COVUSUM, StockOpter, CFS Tax Software, Inc., PLANNER CS, TaxCast, holistiplan
<b>INVESTMENT DATA/ANALYTICS</b> Morningstar, YCHARTS, FI360, REFINITIV, PORTFOLIO VISUALIZER, kwant, koyfin, eVestech, Bloomberg Terminal, CFRA, FACTSET, Nasdaq, AdvisorTools, Zephyr, BITA, BlackRock, Aladdin, CHAIKIN, ADVISORY WORLD, INVESTORPRO, equisoft/fund, FeeMetri(k)s, Windham Labs, portfoliodesigner, BLUE VAULT, TREND RATING, TELEMET, magnifi, factorE, indexone, LOGICLY, finmason, Portformer, ESC/SRI, CLARITY AI, ethos, ACT ANALYTICS, YourStake	<b>REBALANCING ONLY</b> Capitect, ALTEXCHANGE, Emotomy, Pontera, d1g1t, Smartleaf, intelliflo, redblack, FLYER	<b>CUSTODIAL PLATFORM</b> RBC, SHAREHOLDERS SERVICE GROUP, Charles Schwab, sel	<b>FINANCIAL PLANNING</b> eMoney, ENVESTNET MoneyGuide, RightCapital, moneytree, ExecPlan, Profiles, WEALTHCARE, MAXIFI, voyant, inStream, CHESHIRE SOFTWARE, Plan tech Hub, NaviPlan, wealthtrace	<b>PLANNING LIGHT</b> advisys, Savology, ProjectionLab, TIFIN Plan	STUDENT LOAN: EFC PLUS, PAY FOR ED, CFS, CSLA TECH, Student Loan Eliminator, payoff, College Aid Pro CASH MANAGEMENT: MAX, Flourish, advisor.cash, 765 AVANTE, Healthpilot, healthcare planning OTHER: Special Needs Map, CFM, REAL ESTATE FINANCIAL PLANNER, Onramp, HOPE TRUST, giveback, Carefull, Sora, CHARITYVEST
<b>STRESS TESTING</b> MacroRisk Analytics, Dimensional, RiXtrema, HiddenLevers	<b>ADVISOR DATA WAREHOUSING</b> entrustody, Altruist, SKIENCE, BridgeFT, MILE MARKER	<b>SOCIAL MEDIA ARCHIVING</b> globalRELAY, smارش, Pagefreezer, MESSAGE WATCHER, MyRepChat, erado, REDTAIL, results	<b>COMPLIANCE</b> RIA in a Box, RED OAK, ForesideConnect, InvestorCOM, ComplianceMAX, RegEd, PATRINA, FIN Compliance, SmartRIA, jook, FILE   13F	<b>CLIENT MEETING SUPPORT</b> MobileAssistant, Copytalk, SPEAKWRITE, coniq, PULSE360	<b>ADVICE ENGAGEMENT</b> fp alpha, asset+map, fpPATHFINDER, ADVICE SYSTEMS, INC., MyPlanMap, visiWealth, knudge, BENTO ENGINE, LUMIANT, Elements
<b>401(K) IMPLEMENTATION</b> nextcapital, Betterment, Vestwell, FIDUCIARYSHIELD	<b>FORMS MANAGEMENT</b> agreement EXPRESS, QUIKI, IPIPELINE, conga	<b>CRM</b> REDTAIL, salesforce, Wealthbox, ProTracker Software, ugru, GORILLA 5, Advyzon, NEXJ, ENVESTNET Tamarac, SmartOffice, AdvisorEngine, Practifi, equisoft, Microsoft Dynamics 365, Less Annoying CRM, WEALTHCONNECT, CRM OVERLAYS, XLR8, SKIENCE, SS&C, AppKnow, redcapture	<b>ADVISOR LEAD GEN</b> smartasset, wealthtender, FEE ONLY NETWORK, MyaiPerfect, HARNES WEALTH, Lasso, WISERADVISOR, INVESTMENT FIRMS, ZOE, Finny, RAMSEY, Advice Chaser, Wealthramp, indyfin, planswell	<b>CLIENT DATA GATHERING</b> conga, benjamin, ForwardLane, HUBLY, Precise, LifeArcPlan, TOUCHSTONE PATHWAY, Anvil	<b>ACCOUNT AGGREGATION</b> ALBRIDGE, ENVESTNET Yodlee, ByAllAccounts, PLAID, eMoney, Broadridge, Aquilulate
<b>DIGITAL MARKETING</b> SMAPPY KRAXEN, advisorstream, Veriday, fmg suite, hearsay, FMEx, Seismic, Broadridge, gainfully, CLEARNOMICS, MarketDesk, RWM, cobutler, REACH STACK, AP PREMIUM, CATCHLIGHT, RETIREMENT PLAN MARKETING, central one, Advisor I/O, Hyperchal, Social, Lead Pilot, TIFIN Clout, denimsocial	<b>CLIENT PORTAL</b> WEALTH ACCESS, CIRCLE BLACK, eMoney, SUMMITAS	<b>CLIENT FILE SHARING</b> FutureVault, ShareFile, Dropbox, EGN*TE, box, ComConnect, FILE SYNC, SIDEROCKER	<b>BUSINESS SYSTEMS SUPPORT</b> conga, benjamin, ForwardLane, HUBLY	<b>CLIENT MEETING SUPPORT</b> MobileAssistant, Copytalk, SPEAKWRITE, coniq, PULSE360	<b>SCHEDULE APPS</b> you can book me, calendly, Engage ware, ScheduleOnce, Acuity SCHEDULING
					<b>DOCUMENT MANAGEMENT</b> Docupace, Worldox, netdocuments, Paperclip, eFileCabinet, Laserfiche
					<b>E-SIGNATURE</b> DocuSign, RightSignature, Adobe Sign, HELLOSIGN