Tech Resources

Veronica Karas

CAPTRUST

Using a “First Year Blueprint” To Show/Demonstrate Financial Planning Value to Prospects

Planner

Cameron Valadez

Planable Wealth

Using Asset Map To Help Prospects Visualize the Value of Working Together

asset+map

textexpander

OnceHub

Mike Zung

Java Wealth Planning

Creating a Personal Website as a Portal for Each Client by Leveraging Google Sites

Google Sites

RightCapital

SankeyMATIC

Tech Resources

Tiffany White
Halter Ferguson Financial, Inc.

Using Values-and-Goals Cards To Build Rapport With New Clients

- Whiteboard

Riley Anderson
InvestorDNA

Using a One-Page Financial Dashboard To Maximize Value During Client Meetings

- Google Slides
- INCOMELAB
- SNAP PROJECTIONS
- advice

John Mason
Mason & Associates

Creating a Systematized Client Agenda Process To Make Client Review Meetings More Meaningful

- zapier
- Excel
- Jotform
- Constant Contact
- Calendly