

# Financial AdvisorTech Solutions Map

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## FINANCIAL PLANNING

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### PLANNING LIGHT



### SPECIALIZED PLANNING

#### RETIREMENT



#### ESTATE



#### LEGACY



#### TAX



#### EDUCATION



#### CASH MANAGEMENT



#### HEALTHCARE/MEDICARE



#### BUSINESS VALUATION



#### 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



### ACCT 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

