Financial AdvisorTech Solutions Map

RISK TOLERANCE
riskalyze, FinaMetrica, STRATIFI, TOLERISK, DataPoints, finmason, CapitalPreferences, MORNINGSTAR Global Risk Model, Pocket Risk, totum, RISKPRO, ATA RiskStation, ONPOINTE Risk Analyzer

BUSINESS INTELLIGENCE/METRICS
3Xequity, advisor metrix, AdvisorClarity, truelytics

ADVISORY FEE BILLING
BILLFIN, BaySys TECHNOLOGY, LLC, billPort, bill.com, AdvicePay, SMARTKX

CLIENT SURVEY/FEEDBACK
Client Insights, NEXA INSIGHTS

DIGITAL ONBOARDING
charles SCHWAB INTELLIGENT PORTFOLIOS, BlackRock, eQuipt, Marstone, AdvisorEngine, SIGFIG, HARVEST Savings & Wealth Technologies, FusionIQ, ETNA, Bitsy, Nest Wealth

ALL-IN-ONE
ENVESTNET Tamarac, ORION, panoramix, MORNINGSTAR Office, ADDEPAR, Black Diamond WEALTH PLATFORM, intelliflo portfolio, MYVEST, investcloud, Advisor360°, Vestmark.

CUSTODIAL PLATFORM
RBC, SSG SHAREHOLDERS SERVICE GROUP, charles SCHWAB, TradePMR, Folio Institutional, ClientWorks, Betterment For Advisors, SEI Wealth Platform, ASSETMARK, ADVICEWORKS, NETX360, AXOS ADVISOR SERVICES, Wealthscape, Altruist

PERFORMANCE REPORTING
Schwab Advisor Portfolio Connect™, POWERADVISOR LLC, Lifeworks, blueleaf, ALBRIDGE, Advyzon, FIRST RATE, Broadridge

MANAGED SERVICE PROVIDERS
FCI, TRUE NORTH NETWORKS, itegria, RIGHTSIZE SOLUTIONS, workplace_ by OS33, FUSIONNETIX IT SOLUTIONS & CYBERSECURITY

FINANCIAL PLANNING
eMoney, ENVESTNET MoneyGuide, RIGHTCAPITAL, moneytree, PR Profiles™, WealthTec WT, ExecPlan, MAXIFI, NaviPlan® by Advicent, WEALTHCAREGDX®, voyant, inStream, CHESHIRE SOFTWARE, wealthtrace Retirement & Financial Planning Software, Elements, Plan tech Hub

PLANNING LIGHT
advisys, MORNINGSTAR GOAL BRIDGE

SOCIAL MEDIA ARCHIVING
globalRELAY, smarsh, Pagefreezer, MESSAGE WATCHER, MyRepChat, erado, presults

BEHAVIOR ASSESSMENTS
Money Quotient, DataPoints, ATLAS POINT, RCL Advisor, Financial DNA, INVESTING YOU, FINANCIAL ADVISOR ALLY, Positivly, AndesWealth Technologies

LIFE STAGE INSIGHTS™

SPECIALIZED PLANNING
RETIREMENT
RA RETIREMENT ANALYTICS, MAXIMIZEmy SOCIAL SECURITY, Social Security TIMING, INCOME SOLVER, Bucket Bliss, RetireUp, Wealth2k, SSANALYZER, INCOMELAB, INCOMECONDUCTOR, timeline, theBigPicture, AnnuityCheck, JOURNEYGUIDE

ESTATE
ASSURANT Executor Assist, Vanilla, Yourefolio

LEGACY
LifeSite, everplans, LegacyShield, wishlife, everpresent

TAX
Bloomberg BNA, myStockOptions.com, StockOpter, CFS Tax Software, Inc. Software for Tax Professionals, PLANNER CS, TaxCast, COVISUM, holistiplan

STUDENT LOAN
EFC PLUS Simplifying Financial Aid, PAY FOR ED, CFS collegiatefundingsolutions.com, CSLA TECH A SMARTER WAY TO REPAY, payitoff, LoanBuddy, StudentLoan Eliminator, College Aid Pro

OTHER
Special Needs Map, whealthcare planning, 65 MAX, AVANTE, CFM CASE FILE MANAGEMENT, GENIVITY Health, Wealth, Family, Connection, Healthpilot

INVESTMENT DATA/ANALYTICS
MORNINGSTAR, YCHARTS, Fi360, REFINITIV, PORTFOLIO VISUALIZER, kwant:, KOYFIN, eVestech, Bloomberg Terminal, CFRA, FACTSET, Nasdaq, NASDAQ DORSEY WRIGHT, CHAIKIN, ADVISORYWORLD FINANCIAL TECHNOLOGY, Windham Labs, Zephyr, magnifi, factorE, LOGICLY, finmason, Portformer™

ESG/SRI
ACT ANALYTICS, YourStake

PORTFOLIO MANAGEMENT
CIRCLE BLACK, AXYS, SMArtX Advisory Solutions, Profile Software, CANVAS, TradingFront, OBJECTWAY, FinFolio, CLSAUTOPILOT, riskalyze, AssetBook, FINARTIS, INDATA AI, FIS, Charles River, INVESTEDGE, Fitek LLC, ndexsystems, COMARCH, Bridge, d1g1t, FeeX, Capitect, Emotomy

REBALANCING ONLY
iRebal®, Smartleaf, 55ip, Moxy®, BlazePortfolio, REDBLACK, SOFTPAK FINANCIAL SYSTEMS, REFINITIV, Rowboat Advisors, LIFEYIELD, AdvisorPeak

STRESS TESTING
MacroRisk ANALYTICS, Dimensional, RiXtrema, HiddenLevers, ONPOINTE Risk Analyzer, finmason, FABRIC

401(K) IMPLEMENTATION
nextcapital, Betterment For Business, Vestwell, FIDUCIARYSHIELD by BidMoni

FORMS MANAGEMENT
agreement EXPRESS, QUIK!, LASER APP SOFTWARE, conga

CRM
REDTAIL, salesforce, Wealthbox, PT ProTracker Software, Junxure, equisoft, EBIX, ENVESTNET Tamarac, Advyzon

CRM OVERLAYS
XLR8, SS&C Salentica, Practifi, APPCROWN, WEALTHCONNECT, Skience

DIGITAL MARKETING
SNAPPY KRAKEN, advisorstream, Veriday, fmgsuite, hearsay, SEISMIC, Broadridge, gainfully, FMeX, Hyperchat Social, seven GROUP, Lead Pilot, clout, REACH STACK, cobutler, centsai one, RWM

ADVISOR LEAD GEN
smartasset, wealthtender, FEE ONLY NETWORK, MyPerfect Financial Advisor, HARNESS WEALTH, Wealthramp, WISERADVISOR, Advice Chaser, planswell, indyfin, ZOE FINANCIAL, Finny

PLAN MONITORING
MyPlanMap, knudge HUBLY

BUSINESS SYSTEMS SUPPORT
conga, benjamin, ForwardLane

CLIENT NOTE TAKING
MobileAssistant Talk, Don't Type, SPEAKWRITE, Copytalk, PULSE360

COMPLIANCE
RIA in a Box Software & Technology, RegEd, RED OAK Compliance Solutions, PATRINA, ComplianceMAX™, SmartRIA, Joot

CLIENT DATA GATHERING
Precise FP, LifeArcPlan, Anvil TOUCHSTONE PATHWAY

ADVICE SUPPORT
fp alpha, fpPATHFINDER, BENTO ENGINE, ADVICE SYSTEMS, INC.

MIND MAPPING
mind meister, asset+map

CLIENT FILE SHARING
FutureVault, box, Dropbox, ShareFile, EGNYTE, ComConnect FILE SYNC, SIDEDRAWER

DOCUMENT MANAGEMENT
Docupace, Worldox, netdocuments, eFileCabinet, Laserfiche

ACCOUNT AGGREGATION
ALBRIDGE, ENVESTNET Yodlee, ByAllAccounts, PLAID, eMoney, Broadridge, Aquinulate

CLIENT PORTAL
WEALTHACCESS, CIRCLE BLACK, SUMMITAS, eMoney, KUBERA, investcloud

SCHEDULE APPS
you can book me, calendly, timetrade, ScheduleOnce, Acuity SCHEDULING

E-SIGNATURE
DocuSign, RightSignature, Adobe Sign, HELLOSIGN

January 2022 | Latest version available at: kitces.com/fintechmap

= Category Newcomer = Enterprise

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