

Financial Service Platforms

Investments
Custodian



Charles Schwab

Insurance
Brokerage



NFG Brokerage

Tax Planning
Software



Holistiplan

Licensing/Compliance

Compliance

COMPLY

Comply

E&O



NAPA

License

COMPLY

Comply

Advisor Technology

CRM



Redtail CRM

Financial Planning



eMoney

Portfolio Management



Charles Schwab

FP Billing



AdvicePay

Website



Wordpress

Microsoft Business



Microsoft 365

Data Collection



Precise FP

External Services

Entity Formation



LaxBP

Tax



LaxBP

Payroll



LaxBP

For additional information visit: LaxBP.com/RIA

For alternative platforms visit: Kitces.com/fintechmap