Tech Opportunity Finder.

Find new technology offerings that can increase your value proposition, elevate your client service model, streamline, and scale your business processes. Need help? Consider using the Ideal Client Persona Toolkit.

YOUR IDEAL CLIENT(S)

REVIEW ADVISOR TECHNOLOGY SOLUTION CATEGORIES

Based on your goal(s), select advisor technology solutions that you would like to consider adding to your tech stack. Enter the following:
N/A - not applicable or don't want
✓ - have and are happy
For the rest, prioritize your wants in order of importance

	Operations Essentials		Financial Planning		Investment Management
	CRM		Cash management		401(k) Implementation
	Client file Sharing		Goal planning		Investment data/analytics (e.g. Ycharts)
	Billing		Mind mapping		Model marketplace (e.g. Morningstar)
	Compliance		Planning light		Trading & rebalancing
	Document management		Retirement planning		Performance reporting
	E-Signature		Student loan		Portfolio management
	Forms management		Tax planning		Proposal generation
	Managed service provider (IT)		Education planning		Rebalancing only
	Digital onboarding		Estate planning		Risk tolerance
	Virtual assistant		Legacy planning		Stress testing
	Workflows (e.g. Hubly)		Other:		Other:
	Human Resources				
	Other:				

	Client Engagement		Business Development
	Advice engagement (e.g. Bento Engine)		Advisor lead gen (e.g. Zoe Financial)
	Client note taking		Business intelligence/metrics (e.g. Truelytics)
	Client portal		Digital marketing
	Client survey/feedback		Website
	Ongoing plan monitoring (e.g. MyPlanMap)		Other:
	Meeting schedule Apps (e.g. Calendy)		
	Virtual meeting (e.g. Zoom)		
	Behavioral assessments (e.g. TIFIN Personality)		
	Client data gathering (e.g. PreciseFP)		
	Other:		

Three Pillars of Advisor Tech.

Consider this: What are you missing? What do you want to amplify?