

**TECHNOLOGY FOR ADVISORS**

# One Connected Experience Built Around How You Work



Keep your day moving faster and strengthen client connections with our integrated slate of proprietary and industry-leading third-party tools. Intuitive to use and simple to adopt, they're designed to enhance the way you already work. From deeper client collaboration to smoother planning and communication, every solution helps you do more of what matters with less friction.

**Collectively, they create a smarter, more seamless way to deliver your best for your clients, your team, and your business.**



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# Client Engagement



**AdviceWorks** is an all-in-one, interactive workspace designed to help you and your clients collaborate and manage finances, offering secure document sharing, comprehensive reports, account aggregation, and interactive planning tools.



**Atlas Point Edge** provides intuitive and guided solutions for you to deepen client relationships through science-backed surveys, actionable insights, client-ready materials, and a library of educational materials.



**Calendly** is an online appointment scheduling platform that creates a personalized booking link and integrates with many calendars and CRM platforms.



**Carefull** is a service designed to organize and protect the finances of older adults, monitoring accounts for late or missed payments, changes in spending patterns, unusual transactions, or signs of fraud.



**Copytalk** is a transcription service engineered to provide exceptionally accurate verbatim documentation of all client conversations and dictation of any meeting notes, action items, or reminders.



**GReminders** is an automated scheduling and SMS reminder platform that integrates with Google, Outlook, and other CRM systems to send automated, customizable appointment reminders and provide AI-powered meeting notes.



**Jump** is an AI note-taking tool designed exclusively for advisors, turning conversations into tasks, meeting notes, follow-up emails, compliance records, and more.



**MyRepChat** is a tool that enables you and your clients to communicate through compliant SMS texting.



**Nitrogen** is a risk tolerance platform that aligns risk, portfolio analytics, and retirement goals, leveraging each client's unique Risk Number through an interactive client assessment.



**OnceHub** is an online appointment scheduling platform that creates a personalized booking link and supports multi-channel communication, including live chat, instant calls, and booking forms.



**Zoom** is a cloud-based video conferencing platform that facilitates online meetings, webinars, and live chats.

## Custodial Platform



**BNY | Pershing** is a global provider of financial solutions to advisors, broker-dealers, wealth managers, and other financial institutions, offering services like clearing, custody, settlement, and technology solutions.



**Cetera Investment Services** helps supervise and facilitate trades, acting as a custodian for brokerage and advisory accounts, including individual retirement accounts (IRAs).



**Charles Schwab** is one of the nation's largest custodians, providing trading capabilities, reporting, and secure storage of assets.



**National Financial Services**, a subsidiary of Fidelity Investments, provides services for brokerage accounts, including trade execution, clearing, and client reporting.

## Customer Relationship Management (CRM)



**Redtail** is a CRM developed for financial professionals to streamline daily operations, while also offering solutions for document imaging, email management, and text communication.



**Salesforce** is a cloud-based CRM offering numerous AI-driven products and services to help you grow your businesses.



**Wealthbox** is a modern CRM designed specifically for financial professionals that offers everything you need to stay connected to your clients, prospects, and coworkers.

## Digital Marketing



**Bitly** is a URL shortening and link management platform to create shorter, more memorable links and track their performance across channels.



**Buzzsprout** is a podcast hosting and distribution platform with a user-friendly interface and tools for optimizing audio quality and creating short video clips from podcasts.



**Faucet** is a turnkey solution to archive comments posted to Facebook Ads in order to maintain FINRA compliance.



**FMG Suite** is a marketing platform for hosting and creating traffic-driving websites with modern designs, SEO tools, and lead generation features.

## GrowthLine

**GrowthLine** is a program designed to enhance your website presence and develop a multi-channel marketing plan with key metrics to drive measurable growth, improve sales, and boost client engagement.



**Levitate** is a marketing platform designed for relationship-based businesses to send personalized marketing at scale, including email, social media, and handwritten cards, boasting a 60% average email open rate by avoiding mass-blast formats.



**Libsyn** is a podcast hosting and distribution platform that provides tools and advanced analytics for podcasters to create and distribute podcasts to major directories.

## MarketingCentral

**MarketingCentral** is a comprehensive marketing platform that brings together multi-touch email campaigns, social media, print, marketing plans, and event marketing tools into one centralized place.

# Document Management



**Box** is a cloud-based platform that offers secure content management, collaboration, and workflow automation, transforming key processes while maintaining security and compliance.



**Docupace** is a digital operations platform designed specifically for wealth management firms, providing data and forms processing, document management, automated workflows, and secure data storage.



**DocuSign**, integrated with Docupace, is a document signing software to legally—and securely—collect signatures online in minutes.



**Redtail Imaging** is a cloud-based, compliant document storage and management system, integrated directly with Redtail CRM, tailored for financial advisors to securely digitize and manage client paperwork.

## Financial Planning



**Advanced Time Segmentation** is a retirement income-planning tool that allocates assets into distinct time segments, each designed to generate income during specific periods of life.



**AdvicePay** is a payment platform that offers convenient fee-for-service client payment options to manage fee-based financial planning, adding flexibility to fee structures and expanding your client pools outside of the AUM model.



**Asset-Map** is a visual financial planning software that creates user-friendly reports mapping a household's complete financial picture, including assets, liabilities, insurance, and cash flow.



**eMoney** is a streamlined, goals-based financial planning solution and client portal that provides an interactive experience with account aggregation to increase transparency and collaboration with clients.



**Holistiplan** synthesizes clients' financial tax documents to map where and how their money could flourish with Roth conversions, tax-efficient withdrawals, charitable giving, and more.



**MoneyGuidePro**, integrated into AdviceWorks, provides advanced solutions and sophisticated capabilities to help you meet the unique needs of each client through goal-focused planning services.

## RightCapital

**RightCapital** is a financial planning software offering tax-efficient distribution strategies, insurance needs evaluation, risk tolerance assessment, and cash flow mapping to help you create comprehensive and easy-to-understand plans for your clients.

## Vanilla.

**Vanilla** is an AI-powered estate planning software designed for financial advisors to create, visualize, and manage comprehensive estate plans, including tax projections and trust structures.

## wealth.com

**Wealth.com** is an AI-powered digital estate planning solution that streamlines the process with online tools, proactive insights, and access to an in-house legal team, all aimed at making estate planning more efficient and accessible.

# Investment Management

## Fi360

**Fi360**, now part of Broadridge, helps you implement prudent fiduciary practices—from education and training to software and analytics—to gather, grow, and protect your clients' assets.

## MORNINGSTAR®

**Morningstar Advisor Workstation** is a web-based investment planning platform that provides you with tools for investment planning, portfolio analysis, security research, and sales presentations.

## myadvice

**My Advice Architect** is Cetera's unified advisory platform where you can manage every step of the investment process in one place: research, proposal generation, portfolio creation, robust rebalancing and trading, monitoring and account performance, and reporting.

## NETX360®

**NetX360** is Pershing's end-to-end platform to execute trades, settle transactions, and manage custody assets across all brokerage accounts.

## Orion\*

**Orion Advisor Solutions** provides a comprehensive suite of portfolio accounting, trading, and behavioral finance-driven investment solutions for everyone from solo advisors to top RIAs.

## PERSHING X / BNY MELLON

**PershingX** is a technology provider within BNY, focused on delivering a data-driven suite of advisory tools, such as the Wove platform, which is integrated with multiple leading custodians.

## YCHARTS

**YCharts** is an investment research platform used to analyze securities, build portfolios, and communicate investment insights to clients.

## Lead Generation



**AcquireUp** provides data-driven seminar marketing, offering both in-person and digital strategies to generate leads, enhance conversations, and manage client engagement.



**Purse Strings** is a network for women in financial services, providing opportunities to get in front of a female audience and increase reach on social media.



**SmartAsset** is an end-to-end lead generation solution, providing referrals to high-intent leads, automated outreach, and nurture campaigns to help attract more AUM.

Cetera Financial Group (Cetera) is a network of independent retail firms, including those that are members of FINRA/SIPC: Cetera Advisors LLC; Cetera Wealth Services, LLC (formerly known as Cetera Advisor Networks); Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors); and Cetera Financial Specialists LLC. Entities registered as investment advisers with the Securities and Exchange Commission include Cetera Investment Management LLC and Cetera Investment Advisers LLC. Cetera's principal office is located at 655 W. Broadway, 11th Floor, San Diego, CA 92101.

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