The ADVSR Tech Map

565 products an advisory firm can run on, in 14 categories and 66 jobs. Each one checked against the vendor's own website.

November 2026

Last checked November 21, 2026

financialadvsr.com/tech/map

AI tools 62

Meeting notetakers
- **Aveni**
- **Continuum**
- **Contio**
- Copytalk
- DataDasher
- Fathom
- Filenote AI
- **Finmate AI**
- Fireflies.ai
- **Focal**
- Grain
- **GReminders**
- **Jump**
- **Mili**
- Munin AI
- Parrot AI
- **Saturn**
- SpeakWrite
- Synopsist
- **Zeplyn**
- **Zocks**

Assistants and agents
- Aculis AI
- AdvisorClaw
- Ariath
- Briefly
- **Caddi**
- DeepVest
- **FastTrackr AI**
- **Hazel**
- JIFFY.ai
- **Nevis**
- Nextvestment
- Paradino
- PitCrew
- Practice Intel
- Quanto
- Quin
- REDA AI
- Sherpas
- Strata AI
- Tandems
- **TIFIN AI**
- Vega Minds
- WealthStream

Research and documents
- **Boosted.ai**
- EquiReason
- Financial AI
- Fintellion
- PocketFiling
- PortfolioMetrics
- **Powder**
- **Qdeck**

Prospecting
- Aidentified
- Cashmere
- **Catchlight**
- **FINNY**
- Finterest
- Habits
- Powerlytics TrueWealth
- VastAdvisor
- WealthFeed
- WealthHawk

Custody and clearing 13

RIA custodians
- Alto
- **Altruist**
- **Axos Advisor Services**
- Betterment Advisor Solutions
- **Fidelity Institutional**
- Goldman Sachs Custody Solutions
- Innovayte
- **Interactive Brokers (advisor services)**
- **Schwab Advisor Services**
- **TradePMR**

Clearing and broker-dealer services
- **Apex Fintech Solutions**
- **BNY Pershing**
- RBC Clearing & Custody

CRM 33

Advisor CRM
- AdviAlly
- Advisor360 for RIAs
- AdvisorCRM
- **AdvisorEngine CRM**
- Advisors Assistant
- Altitude
- Equisoft/connect
- FinTurk
- LeadCenter.AI
- Less Annoying CRM
- Maximizer
- OmegaFP
- **Practifi**
- ProTracker
- Quivr CRM
- **Redtail**
- SignalWealth
- Slant
- Strad
- TOOLKIT CRM
- UltimateCRM
- **Wealthbox**
- WealthY

Enterprise CRM
- Avantos
- Microsoft Dynamics 365
- NexJ
- **Salesforce Financial Services Cloud**
- **Skience**
- SmartOffice

CRM add-ons
- IntegratedAdvisor
- ReachStack
- ShellBlack
- XLR8

Portfolio management 45

All-in-one platforms
- Advisor360
- AllocateRite
- Altafid
- Amplify Platform
- Arcons Technology
- ARQA
- Blueleaf
- BNY Pershing Wove
- CircleBlack
- FinFolio
- OneVest

Reporting and accounting
- **Addepar**
- **AdvisorEngine**
- **Advyzon**
- AssetBook
- **Black Diamond**
- **Capitect**
- **d1g1t**
- EZFolio
- First Rate
- gAIn360
- Gyre Research
- Masttro
- NDEX Systems
- **Orion**
- Osyte
- **Panoramix**
- Ridgeline
- **Tamarac**
- Vi4Wealth

Rebalancing and trading
- Bloxfolio
- ETNA
- Flyer
- **iRebal**
- MSCI Wealth Manager
- RebalancerPro
- RedBlack
- **Smartleaf**
- SoftPak
- SS&C Genesis
- **Vestmark**
- ZerreSpace

Direct indexing and tax
- **55ip**
- Alphathena
- Pave Finance

Financial planning 68

Comprehensive planning
- **Asset-Map**
- Cheshire Wealth Manager
- **Conquest Planning**
- **eMoney Advisor**
- FinDash
- Foundry Planning
- Libretto

Financial planning, continued
- MaxiFi Planner
- **MoneyGuide**
- Moneytree
- NaviPlan
- **RightCapital**
- Voyant
- WealthTec
- WealthTrace

Planning tools
- advice.ai
- Advisys
- Caravel Concepts
- El Camino Financial
- Kerdora
- PlanTechHub
- ProjectionLab
- Retirement Analyzer
- Savology
- Stonewood

Tax planning
- april
- Bloomberg Tax Income Tax Planner
- **FP Alpha**
- Hive Tax
- **Holistiplan**
- Planner CS
- RetireTax Scan Pro
- Stratum
- SymPalTax
- Tax Clarity
- TaxCast
- TaxTools
- Worthy

Estate planning
- BeyondWill
- EncorEstate Plans
- EstateView
- Josda
- Luminary
- ONESOURCE Estate Planning
- Trust & Will
- **Vanilla**
- **Wealth.com**
- Yourefolio

Retirement income
- Bucket Bliss
- Cherish Buckets
- Fiduciary Genius
- Income InSight
- **Income Lab**
- Income Solver
- IncomeConductor
- JourneyGuide
- QuantCalc
- ReadyAimRetire
- The Big Picture

Social Security
- Maximize My Social Security
- MySSAgent
- Savvy Social Security Planning
- SEI LifeYield Social Security+
- ShoreUp
- Social Security Timing

Held-away accounts
- Future Capital
- Plan Confidence

Financial planning, continued
- **Pontera**

Specialist planning 37

Equity compensation
- EquityNav
- Gemifi
- Grantd
- myStockOptions
- Trayecto

College and student loans
- College Aid Pro
- Collegiate Funding Solutions
- Finology Software
- PayForED

Health care and Medicare
- AiVante
- Healthpilot
- HealthView Services
- HighPeak AI
- i65
- Waterlily

Business owners
- Capitaliz
- interVal
- Maus
- RISR

Charitable giving
- Charityvest
- PhilanthPro

Insurance analysis
- Life Insurance Analytics
- Veralytic
- Wink

Legacy and family records
- Covet
- Everplans
- Forward Inheritance
- Ironclad Family
- Total Family
- Trustworthy
- Trusty

Real estate and other
- Cashflow Mapping
- Hope Trust
- Leveridge
- REWealth Reports
- SecureSplit
- Special Needs Map

TAMPs and models 7

TAMPs
- **Adhesion Wealth**
- **AssetMark**

TAMPs and models, continued
- **Envestnet**
- **Focus Advisor Solutions**
- **GeoWealth**
- **Orion Portfolio Solutions**
- **SEI (advisor solutions)**

Retirement plans 12

401(k) providers
- 401GO
- Betterment at Work
- Guideline Pro
- Human Interest
- Vestwell

Plan advisor tools
- Fiduciary Shield
- FiduciaryWorks
- MethodPlan
- PlanPort
- PlanPro
- Retirement Plan Marketing
- RiXtrema

Alternatives platforms 11

Access platforms
- **Allocate**
- **CAIS**
- **GLASfunds**
- **iCapital**
- **Opto Investments**

Alternatives operations
- Alkymi
- AltExchange
- Arch
- **Canoe Intelligence**

Alternatives research
- Altidar
- Blue Vault

Compliance 36

Compliance platforms
- **ACA Group**
- Complect
- Compliance Approved
- **COMPLY**
- CRC Oyster Solutions
- FIN Group
- **Greenboard**
- **Hadrius**
- La Meer
- Luna Compliance
- **MyComplianceOffice**
- RegVerse
- RIA Compliance Technology
- Skematic

Compliance, continued
- **Smartria**

Archiving
- Archive Intel
- Comma
- **Global Relay**
- Pagefreezer
- Patrina
- Presults
- **Smarsh**
- Turret
- XY Archive

Marketing review
- Red Oak
- **Saifr**

Client texting
- CurrentClient
- fidUlink AI
- MyRepChat
- Qwil Messenger
- Redtail Speak

Rollover and Reg BI
- Due Diligence Works
- FeeMetriks
- InvestorCOM

Filings and vendor risk
- File13F
- ThirdNexa

Client experience 73

Onboarding and account opening
- **Docupace**
- **DocuSign**
- Feathery
- FusionIQ
- Investipal
- Marstone
- Nest Wealth
- OnBord
- **PreciseFP**
- Responsive

Data gathering
- Cartenda
- Fin Pods
- Flextract
- Jotform
- Overvue
- Red Capture
- TaxStatus
- WealthSnap

Client portals and vaults
- AdviceWorks
- eVestech
- FutureVault
- Fynancial
- Harbor
- Kubera
- Monarch
- Portal+
- SideDrawer

Client experience, continued
- Summitas
- Wavvest
- **Wealth Access**

Advice engagement
- Bento Engine
- Elements
- Financial Story Plan
- fpPathfinder
- InvestSuite StoryTeller
- Knudge
- Lumiant
- Lydia
- Meetings Hub
- MyMoneyVision
- NovaTrak
- PlanScore
- visiWealth

Behavior and values
- Atlas Point
- COREnology
- DataPoints
- Financial DNA
- Finiliti
- Investing You
- Knomee
- Legacy
- Money Quotient
- ROL Advisor
- The Passport Package
- Unitifi

Client feedback
- Absolute Engagement
- NEXA Insights
- OpAlpha

Cash and client services
- Atomic Insights
- BILL
- **Carefull**
- Currence
- **Flourish**
- KEEP
- MaxMyInterest
- R&T Deposit Solutions
- Sequence
- SKYVIEW 1

Family office
- Asora
- Copia
- iPaladin
- leafplanner
- Vyzer

Operations 38

Workflow
- Absolute Engagement Engine
- CanyonOps
- Finpace
- Hubly
- Moxo

Document management
- Conga
- Finity360

Operations, continued
- Forms Logic
- Laser App
- Laserfiche
- Paperclip
- QuikForms
- Revver

E-signature
- Adobe Acrobat Sign
- Dropbox Sign
- MyDocSafe
- SIGNiX

File sharing
- Box
- ComConnect
- Dropbox
- Egnyte
- ShareFile

Fee billing
- AdvicePay
- AdvisorBOB
- BillFin
- Smart Kx

Data platforms
- BridgeFT
- Collation.AI
- Dispatch
- INVENT
- Milemarker
- WealthArc

Scheduling
- Acuity Scheduling
- Calendly
- OnceHub
- YouCanBookMe

Firm metrics
- 3xEquity
- AdvisorEconomics

Marketing 65

Content and social
- **AdvisorStream**
- Amplify Reviews
- Clearnomics
- Exhibit A
- FMeX
- **FMG**
- HubSpot
- InfluenceLab
- Levitate
- Mailchimp
- MarketDesk
- MyNameFlow
- Orrigo
- Pageport
- SageContent
- **Snappy Kraken**
- UpContent
- VidVisor
- WealthManagementGPT
- WebPrez

Marketing, continued

Lead generation
- AcquireUp
- Advisor.com
- AdvisorCal
- AdvisorFinder
- BenFi
- ComparisonAdviser
- Datalign Advisory
- FeeOnlyNetwork
- FinanceHQ
- FinancialAdvisors.com
- In Charge
- Indyfin
- Kapitalwise
- Money Pickle
- Planswell
- RWG
- **SmartAsset**
- SmartVestor
- Svvy
- Unbiased
- VerbaPost
- Warmer
- **Wealthtender**
- WiserAdvisor
- **Zoe Financial**

Websites
- Advisor I/O
- AdvisorSEO Max
- Capital Turbine
- Finsites
- Paladin Advantage
- Wealth I/O
- **WealthReach**
- WealthSites
- Yext

Proposals
- ArvoFin
- CapIntel
- Equisoft/analyze
- FolioMax
- Holistico
- Moneytree Merit
- Pack Analytics
- PREZENTD
- RetirementView Pro
- TieoutIQ
- VRGL

Data and research 65

Investment research
- Advis Network
- Aladdin
- Alpha Vee
- Asset Camp
- BITA
- BlackRock Advisor Center
- Bloomberg Terminal
- bondIT
- **Broadridge Fi360**
- Broadridge Fiduciary Governance
- CFRA
- Chaikin Analytics
- Conch
- Countercyclical

Data and research, continued
- Equisoft Fund Compare
- **FactSet**
- FinMason
- Index One
- Jacobi
- Koyfin
- **Kwanti**
- LSEG Workspace
- MarketGrader
- **Morningstar**
- MyDimensional
- Nasdaq Dorsey Wright
- OCIO Analytics
- Optuma
- Ortec Finance
- Parallax
- Personal Fund
- Portfolio Designer
- Portfolio Visualizer
- StrataNova
- Telemet
- Trendrating
- Windham Labs
- **YCharts**
- Zacks Advisor Tools
- Zephyr

Risk profiling
- Amplify QuantumRisk
- Andes Risk
- CalibrateIQ
- Capital Preferences
- DataPoints Investor Profile
- Genesis Risk Monitor
- **Nitrogen**
- OnPointe Risk Analyzer
- Pocket Risk
- RiskPro
- SmartRisk
- StratiFi
- Tolerisk

Stress testing
- MacroRisk Analytics
- Prometheus Risk
- Soborro

Values-based investing
- Clarity AI
- Ethos
- Reflect
- YourStake

Account aggregation
- Blueleaf Aggregation
- Plaid
- Yodlee

Industry data
- **Discovery Data**
- **FINTRX**

- **A brass dot marks a vendor with a full Tech Desk profile.** Every name is a link: to our profile, or to the vendor's own site.

The map is not a ranking, a review or a recommendation, and where a name sits says nothing about its quality. Financial ADVSR sells Atlas, a database of firms and advisors, which competes with vendors listed under Data and research.

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The front page of wealth management.