NEWS

For Immediate Release

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Financial Advisors Attending T3 Conference in Dallas In For A Few Surprises

Technology Solutions Providers to "Reveal All" at Financial Industry Event

Dallas [February 04, 2015] – Financial industry leaders Joel Bruckenstein and David Drucker say that financial advisors attending the tenth annual T3 Technology Conference for financial advisory firms are in for an earful – and an eyeful – while at the Hilton Anatole in Dallas, February 12-14, 2015. Designed to bring together independent financial advisors and company decision-makers with the creators of the industry's most innovative technology solutions, this annual industry gathering has become *the* place to learn about and do research on the best marketing, productivity and workflow solutions available.

"The T3 Advisor Conference will feature 13 general sessions and 25 breakout sessions," said conference co-chair David Drucker, CFP®. "We begin the morning of February 12 with an (optional) ethics session. Preconference sessions will begin at 10:00 that morning. Our big general session speaker, Tom Giachetti, Chair of the Securities Practice Group at the well-known law firm Stark & Stark, will take the main stage at 3:30 to talk about cybersecurity and how advisory firms should be taking steps to protect their firms and their clients from data theft and hackers. February 13 will feature main stage presentations from eMoney, MoneyGuidePro, Schwab, Riskalyze, Nationwide, Morningstar, Advent Black Diamond and RiXtrema. February 14 main stage presentations include speakers from Advicent, Oranj, Laserfiche and FAStech."

"Breakout sessions will feature many of the amazing sponsors and tech providers in attendance," added co-chair Joel Bruckenstein, CFP®. "I'm especially looking forward to the custodian panel, the digital marketing session, the emerging technology sessions, the big data session and the estate planning for digital assets session. On February 14 the conference concludes at 3:30 so that folks can get home to their Valentines that night. But make no mistake, this final day is jam packed with break out sessions and main stage presentations."

"It should also be noted that we will have the CEO of eMoney and two of the top executives from Advent giving keynote presentations on February 13. Given all the buzz in the industry this week about eMoney being acquired by Fidelity and Advent being acquired by SS&C Technologies this is pretty cool," Bruckenstein said.

PREVIEW OF NEWS AND ANNOUNCEMENTS

The T3 Conferences are not just a hotbed of activity and conversation. Many of the industry's leading technology companies and rising stars hold and make major announcements at T3. "Dave and I are privy to a number of interesting developments and announcements that will be made while we are all together in Dallas. In fact, we expect a record number of announcements to be made," Bruckenstein said. "As a courtesy to members of the media who will be covering the conference in person – and for those who are unable to make the trip but would like to stay on top of all the news – we will be posting major announcements on the T3 blog (http://www.technologytoolsfortoday.com/blog). We will be sending out a daily digest of those announcements to members of the press. Anyone who would like to be notified immediately when an announcement goes up on the T3 blog can sign up for an RSS feed (http://www.technologytoolsfortoday.com/blog/feed)."

Here are some of the announcements that Drucker and Bruckenstein expect to be made, with more details being revealed February 12-14th during the T3 conference:

ADVENT TO PRESENT KEY RESEARCH FINDINGS – Advent Software will be demonstrating the Black Diamond℠ wealth management platform's new investor experience, which includes a redesigned investor portal, vault, and powerful communications tools that can be tailored to each client. Advent will also be sharing information about its ever-expanding ecosystem of industry integrations, highlighting new integrations aimed at enhancing advisor workflows that span multiple technology solutions. In addition, Advent will be presenting research findings during a session titled "Elevating the Client Experience –Leveraging Technology to Drive Profitability, Scale, and Growth" showing that strategic investments in technology are transforming and improving the client experience, allowing advisors to take on and efficiently manage more client relationships.

ADVICENT TO UNVEIL NEW SOLUTION – Advicent Solutions, owner of NaviPlan® and Profiles™, will unveil a new solution to help advisors compete against the commoditization of advice. Phil Cunningham, CEO of Advicent, will speak on the T3 main stage on Saturday, February 14, to demonstrate how this new financial application builder helps advisors and firms create a completely unique online experience for their clients—without the usual upkeep tasks and costs.

ADVISORYWORLD TO REVEAL NEW PROPOSAL TOOL – AdvisoryWorld, a leader in portfolio analysis, investment planning and proposal-generation software, has developed a straight-through-processing component for its Proposal Tool. The intuitive web-application will enable advisors to seamlessly open new custodial accounts as a step in the proposal workflow. T3 attendees can learn more on February 12 when Michael Wilson, of AdvisoryWorld, and Jud Mackrill, of Orion Advisor Services, present “From Proposal to Account Opening, an Automated Straight-through Processing Workflow.” During this session, AdvisoryWorld and Orion Advisor will demonstrate and discuss their new Straight-through Processing capabilities. Recent advancements in their collective technology now allow users to create proposals, open new accounts and facilitate on-going portfolio management in an automated workflow.

ADVIZR TO DEMO QUICK COLLECTION WIZARD – Advizr will unveil their fully automated financial planning functionality while at the T3 Tech conference in Dallas. Financial advisors now only need to profile a customer through Advizr's quick data collection wizard. Once that step is completed, with a click of a button the financial plan is ready. Advizr CEO Hussain Zaidi will share additional insights alongside executives from inStream Solutions and MoneyTree Software on February 13th in one of two panels that will be held during the conference on “What’s New in Financial Planning Software.”

BLU GIANT TO LAUNCH NEW WEB PRODUCTION SERVICE – Blu Giant is excited to be launching a new web production called Nova. Stop by their booth at the T3 conference or attend their session on “Brand Technology” on February 12th to learn more.

REDI2 WILL DEMO BILLFIN – Redi2 Technologies has launched BillFin, a super-friendly, cloud-based billing solution that automates the calculation of advisory fees and generation of invoices. BillFin launched its Beta release last November and is set to go live in March of this year. Some of the key features of BillFin are flexible fee schedules, asset exclusions, helpful reminders, invoices, debit files, and third-party integrations. The current integration partners are Redtail Technology’s CRM and TD Ameritrade Instituitional’s Veo Open Access Platform. Attend their session or go by booth #222 for a live demonstration while at T3 in Dallas.

RETIREUP WILL MAKE TWO BIG ANNOUNCEMENTS – #1: RetireUp will announce a relationship with a very large insurance company while at T3. They will be the only retirement income software that can incorporate their specific products in a retirement income plan. #2: RetireUp will announce integration with a market-leading risk analysis software package, providing advisors a comprehensive suite of risk and income planning tools to easily build and convey full financial strategies to their clients. They’ll have a booth and a session at T3.

REBALANCING ON STERIODS: TRX EDGE IS HERE – Sheryl Rowling, CEO of TRX will showcase the new features and functionality advisors can deploy to take advantage of the most tax efficient and easy to use rebalancing software. Attend her session or drop by the TRX booth.

NEXT-GENERATION WEALTH MANAGEMENT TECHNOLOGY FROM VANARE –

Vanare, a next-generation wealth management technology platform for investment advisors, will tell us more about its acquisition of NestEgg Wealth. They say this is the first ever offering that completely integrates online wealth management with traditional wealth management in one seamless solution and that their innovative platform offers RIAs and their clients a comprehensive, interactive and intuitive experience. Go see Vanare in the exhibit hall or attend their session.

JUNXURE, LASERFICHE AND CITIES DIGITAL UNITE – Cities Digital is pleased to announce the Junxure Cloud integration for Laserfiche. The integration allows users to link Junxure Cloud records to folders within Laserfiche (the leading advisor document management system). From a window embedded into the Junxure Cloud interface, users are able to fully interact with Laserfiche documents and folders. Junxure Cloud is just one of many systems that can be integrated with Laserfiche through Cities Digital, including Orion, Schwab Portfolio Center, Tamarac, Salesforce, APX and more. They'll have a session and a booth at T3.

E-VALUATOR COMING OUT OF BETA TESTING AT T3 – Officially coming out of beta testing at T3 2015, The E-Valuator is designed to assist plan fiduciaries and advisors analyze and monitor mutual funds, ETFs and investment portfolios. In addition to scoring traditional risk/return metrics, The E-Valuator's unique methodology allows investment selection and monitoring criteria to be customized to reflect the "Performance Tolerance" of individual clients/plans within three categories: (1) Rate-of-return/performance (2) Duration (3) Credit Attribution. The E-Valuator mitigates fiduciary liability by delivering an easy-to-use, unbiased process that is systematically documented. Look for them at T3 in Dallas.

TRY OUT "SOCIAL SECURITY LED GEN" SYSTEM WHILE AT T3 – Impact Technologies Group, Inc. will while at T3 in Dallas be demoing their Social Security Lead Gen™, personalized lead-generating websites for financial advisors. Advisors get their own personalized website where prospective clients can play with their own data to see how optimizing their Social Security filing can affect their lifetime benefits. The clear, easy-to-use site results in self-qualified leads. When a prospective client takes action, the advisor gets a notification email and the lead goes straight to the Leads tab within the advisor's PlanFacts™ account. Social Security Lead Gen is optimized for devices consumers actually use, including laptops, tablets, and smaGo see them in the exhibit hall.

MARKETWARE TO LAUNCH ONEWORLD FOR ADVISORS – Marketware International is pleased to participate in the 2015 T3 Conference Advisor Edition on February 12-14 in Dallas, TX and to launch the Marketware OneWorld approach for Advisors. Marketware OneWorld is evolving to service the Advisor community. It starts with establishing key technology partnerships in order to deliver and to meet clients' unique Wealth Management requirements in a timely manner. Visit their booth in the T3 exhibit hall.

PANORAMIX ANNOUNCES PARTNERSHIPS AND TURNKEY SOLUTIONS – Panoramix™ is now a proud partner of TD Ameritrade's VEO program and Charles Schwab's MarketSquare program. With these partnerships, Panoramix™ now offers a turnkey, low cost combined CRM and portfolio management system to TD Ameritrade and Schwab RIAs. Go see them while at the T3 conference.

POCKET RISK WILL LAUNCH COMMUNITY FOR FINANCIAL ADVISORS – Pocket Risk, the company behind a unique risk questionnaire for financial advisors, plans to launch a community for financial advisors, academics and other industry professionals to discuss risk. The online community will help advisors learn more about evaluating the appropriate amount of investment risk to take with their clients given their goals, risk tolerance and risk capacity. Find them at T3 on the agenda and in the exhibit hall.

ABOUT THE T3 TECHNOLOGY CONFERENCES

Interested parties can visit http://www.technologytoolsfortoday.com/conferences to view the agenda and register for the event. Journalists may contact teresalaw@impactcommunications.org to request a press pass. FPA and NAPFA members, who will receive preferred pricing based on preconference negotiations with T3, should visit their chapter websites and/or be alert for discount codes that are available on the T3 website registration page.

InvestmentNews is the exclusive media sponsor for the T3 Advisor Conference.

For breaking news, use the official Twitter hashtag #T32015. Join the @T3fan Community on Twitter or "like" the T3 Facebook page for other updates. Additional details and about the conference can be found on the T3 website www.TechnologyToolsForToday.com.

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KEYWORDS:

Dave Druckerx
Joel Bruckensteinx
technologyx
T3 Technology Conferencex
Tom Giachettix
eMoneyx
MoneyGuideProx
Schwabx
Riskalyzex
Nationwidex
Morningstarx
Advent Black Diamondx
RiXtremax
Advicentx
Oranjx

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