

NEWS



For Immediate Release

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T3 2013 Conference Recap

- *Eight-Year Milestone with Record Attendance*
- *Venue for Strategic Partnership and Major Industry Announcements*
- *Release of new book – Technology Tools for a High-Margin Practice*
- *News Sessions Addressing Financial Professionals' Most Pressing Concerns*
- *Industry Leading Speakers and Sponsors*
- *Plans for T3 2014 and new second conference this fall*

MIAMI, FL – March 14, 2013 – Joel Bruckenstein and David Drucker, producers of the “T3” Technology Tools for Today™ Conference (T3), today announced final attendance figures for the eighth annual conference and plans for 2013 and beyond. The T3 2013 conference, held February 11 – 13, 2013 at the Hilton Miami Downtown hotel, attracted over 600 professionals—in spite of the huge snow storm that closed down airports and caused annoying delays all across the Eastern seaboard and connecting cities. This all-time record high demonstrates that T3 continues to be the place where business professionals in the financial services industry come to interact with technology solutions and the technology companies producing those solutions.

“The T3 Conference has developed a reputation for being the place where people come to not only learn about new technology, but to also shape future technological developments by speaking directly to developers and expressing technological needs,” said Dave Drucker. “This was by far our biggest and best conference yet. While we did have some concerns on day one that attendance would fall off due to the sudden snow storm, it was gratifying to see people brave the weather, endure the flight delays, and check in as planned. We even had a number of walk-in registrations, and people asking on Twitter if they could still get in if they just showed up (of course, the answer was ‘yes’),” Drucker said.

NEW BOOK'S CONTRIBUTING AUTHORS A MAJOR DRAW

Ten years after the publication of David Drucker and Joel Bruckenstein's seminal book on technology for financial advisory firms, Drucker and Bruckenstein released a highly anticipated

revised version of the book, [*Technology Tools for Today's High Margin Practice*](#), just weeks before the conference.

“This book is an excellent resource for any advisor focused on running an efficient and profitable business,” said John J. Bowen, founder and CEO, CEG Worldwide, LLC, and a columnist for *Financial Planning* magazine. “Backed by their years of experience, David Drucker, Joel Bruckenstein 'and friends' share their valuable hard-learned lessons and unique insights in this great book for financial advisors who want to use proven technology solutions for doing well by their clients so that they, as advisors, do exceptionally well.”

“Since the new book was out just in time for the 2013 T3 Conference, we thought that attendees might like to hear from some of the contributing authors,” Joel Bruckenstein said. “The contributors are all impressive people, fourteen in all: David Lawrence, Lou Stanasolovich, Marie Swift, Davis Janowski, Dan Skiles, Bob Curtis, Linda Strachan, Mike Kelly, Jon Patullo, Bill Winterberg, JD Bruce, Jennifer Goldman, Tim Welsh, and Bart Wisniewski. Accordingly, one of the conference tracks included some of the book’s contributing authors who addressed hot topics such as the use of digital signatures, marketing technology, social media and websites, CRM selection, custodial integrated platforms, outsourcing, the future of financial planning, cloud computing, and understanding the return on technology investments,” Bruckenstein said.

CUTTING-EDGE SESSIONS

New this year at the 2013 T3 conference were sessions covering estate planning for digital assets, tips and tools to incorporate healthcare planning into long term financial planning, and navigating new computer operating systems for Macs and PCs.

“The T3 Conference in 2013 also included our ‘What’s New In ...’ series,” said Dave Drucker, who for over a decade has worked with Joel Bruckenstein to produce the T3 Technology Tools for Today newsletter and the T3 conferences. “We covered essential technology tools—everything from financial planning and CRM software to document and portfolio management systems and rebalancing software. The vast array of sessions offered at the eighth annual T3 Technology Tools for Today conference put attending advisors on the leading edge, with the latest and greatest technology and practice management solutions for their financial services business,” Drucker said.

Additional content from the conference, including video interviews, a conference highlights clip, and presentation slides, can be found at <http://www.TechnologyToolsForToday.com>.

VENUE FOR MAJOR ANNOUNCEMENTS

Both Bruckenstein and Drucker are quick to point out that T3 is more than just a place for informative sessions. The conference has also developed a reputation as a place to create strategic partnerships and integrations. During this year’s conference, several significant announcements were made:

- Trade PMR previewed Fusion, their next generation, touch enabled advisor workstation. Fusion is optimized for devices like the iPad, Android tablets and the Microsoft Surface, yet it performs equally well on Windows 7 desktops. “Fusion is the first custodial workstation I’ve seen that takes advantage of the capabilities of Windows 8 and other modern operating systems”, said Bruckenstein. “It is an impressive achievement”.
- ScottTrade Advisor Services announced a partnership with MyVest® Corporation to provide modeling and rebalancing and managed portfolio services. These services, based on MyVest’s Strategic Portfolio System™, are planned to be launched later this year.
- StatPro demonstrated numerous upgrades to their cloud based portfolio analytics application, including new client facing reports.
- TD Ameritrade demonstrated its new cloud based version of iRebal, which will be made available to all TD Ameritrade advisors at no extra charge.
- SunGuard demonstrated their new MyRetirement tool to help advisors determine how much a client can safely spend during retirement. They also demonstrated Mobile Meeting for Financial Planning, an app optimized for tablet devices such as the iPad to allow advisors to better communicate and collaborate with clients during the financial planning process.
- Fidelity IWS announced that it will be de-commissioning their original WealthCentral platform soon and going entirely web-based now that more than 3,000 firms, representing 40,000 users, were accessing the platform on a daily basis.
- MoneyTree announced that they will soon release a new online version of their TOTAL Planning Suite. TOTAL Online will add a number of new features including a client access portal and management activity reports.

INDUSTRY LEADING SPEAKERS AND SPONSORS

One of the major draws to the T3 conference, are the industry leading sponsors that exhibit. Some of these leading companies also provide their top-tier executives as speakers. For instance, TD Ameritrade Institutional sent Jim Dario, Managing Director of Product Management, to talk about using technology to intelligently solve practice management problems, and Salesforce sent Rohit Mahna, Director of Financial Services Industry Solutions, to talk up the cloud during his general session presentation.

“Getting Jim Dario to not only come to the T3 conference but to speak at the T3 conference was a pretty big deal,” Drucker said. “After spending 25 years primarily in sales and relationship management posts at other custodians—namely Pershing and Fidelity—TD lured Jim away from Pershing last September by giving him control over product management in a newly created position. Before Pershing, Jim spent more than 20 years at Fidelity Investments in Boston where he held several positions including executive vice president of relationship management of RIA custody where he focused on business development and marketing. So it’s no surprise that Jim offered some very insightful comments during his general session presentation,” Drucker said.

“Another big coup was getting Salesforce to the conference,” Bruckenstein added. “Salesforce is a popular CRM platform, and this was their first year with us. They came to T3 with a mission to support their partners and to put a face to the many custodian integrations in which Salesforce is participating. The industry is growing and there is room for several CRMs, including those built specifically for advisors. Salesforce won’t take over, but they are a presence now—not just a

high-and-mighty corporate entity. We were very happy to include them in the mix,” Bruckenstein said.

“The conference provides a great opportunity for networking and learning about all the leading technology innovations that come out each year,” Drucker said. “One of the reasons we keep the exhibit hall open for so many hours is to give advisory firms the opportunity to make the rounds and demo everything of interest to them. We always hear of integrations, mergers and partnerships that get sparked, forged or announced right at T3. There were numerous dinner parties each night, and when the exhibit hall was closed the lobby bar was always hopping.”

Booths sold out in record time this year. Sponsors included:

Platinum Plus Sponsors:

TD Ameritrade Institutional
Laserfische
Envestnet/Tamarac.
Advent/Black Diamond
Trade PMR
MoneyGuidePro

Platinum Sponsors:

Scottrade Advisor Services
Morningstar, Inc.
AppCrown LLC

Media Partners:

Financial Planning magazine
Investment News

Gold and Silver Sponsors:

Advisor Websites
Advisors Assistant
Arcons Technology, Inc.
AssetBook LLC
Back Office Support Service - BOSS.
Cities Digital
cloudRIA
CONCENTER SERVICES
Concenter Services (XLR8)
Envision Financial Systems, Inc.
Finance Logix
Fox Financial Planning Network
John Norwood Consulting
Junxure
LaserApp Software
LIGHT[PORT]
LPL Financial
NetDocuments
NRS
OMYEN Corp.
Orchestrate, LLC
Orion Advisor Services, LLC
Panoramix Financial
Redtail Technology, Inc.
SEI
SunGARD
Total Rebalance Expert
Trade Warrior, Inc.
Trumpet, Inc.
Your Silver Bullet
Zywave

2013 AND 2014 PLANS

Organizers are finalizing details for the ninth annual T3 conference, which will be held in February 10-12, 2014 at the Hilton Anaheim in Anaheim, CA. Conference details will be available on the T3 website. Several lead sponsors have already renewed their contracts or expressed new interest.

In addition, watch for an announcement from Drucker and Bruckenstein regarding a second annual conference being developed specifically for institutional buyers. “This will be a smaller conference with maybe 40 sponsors, versus the 75 we had this year at T3 2013,” Drucker said.” “We’ll be inviting a select group of broker/dealer executives and national RIAs to attend in an effort to help them find the right resources for their firms,” Drucker said.

About T3 Technology Tools for Today Conference

Since its inception in 2006, the annual Technology Tools for Today Conference (T3) has been the only annual conference devoted exclusively to the technology and practice management needs of independent financial advisors. Co-chaired by the experienced team of Joel Bruckenstein and David Drucker, the T3 conference brings together the nation’s leading technologists, advisors, consultants and technology vendors to discuss technology developments that impact financial advisors.

For conference information, visit www.TechnologyToolsForToday.com. Get breaking news by following @t3fan @daviddrucker @fintechie and @marieswift on www.Twitter.com.