

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours

By David J. Drucker, Joel P. Bruckenstein

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Revolutionize your financial advisory practice with the latest cutting-edge tools

Tired of spending more time with filing cabinets than with clients? Is overhead eating up your margins? In a new revised edition of the "bible" of practice management and technology for financial professionals, two leading financial planners, with some help from their friends*, deliver the knowledge advisors have been begging for. This book serves up a nontechnical trove of technology, clever workarounds, and procedural efficiencies tailored to help financial advisors in private practice move toward today's virtual office. The authors show you how to drastically reduce the paperwork in your office, slash overhead, and find anything you need in seconds using the latest software.

This revised edition includes new information on SaaS and cloud computing, software integrations, mobile devices/apps, social media tools, portfolio accounting and outsourcing, collaborative tools, digital signatures, workflow management, marketing technology and much more.

- Perfect for successful practices seeking greater efficiencies and healthier profit margins
- The authors are well-known financial advisors, each with more than 30 years of experience in financial services
- Addresses the evolution of the virtual office and its impact on advisory firms

If you're looking for new systems and efficiencies to transform and streamline your private practice, look no further than Technology Tools for Today's High-Margin Practice.

*Chapter 1 Selecting the Right CRM System, Davis D. Janowski

Chapter 2 The Future of Financial Planning Software, Bob Curtis

Chapter 3 The Future of Financial Planning Software and the New Client-Advisor Relationship, Linda Strachan

Chapter 4 Portfolio Management Software, Mike Kelly

Chapter 5 Achieving Growth and Profitability with Technology Integration, Jon Patullo

Chapter 6 How the World Wide Web Impacts the Financial Advisor, Bart Wisniowski

Chapter 7 Managing Your Online Presence, Marie Swift

Chapter 8 Client Portals and Collaboration, Bill Winterberg

Chapter 9 The Cloud, J. D. Bruce

Chapter 10 Digital Signature Technology, Dan Skiles

Chapter 11 Innovative Software and Technologies Implemented at One of the United States' Leading Advisory Firms, Louis P. Stanasolovich

Chapter 12 Virtual Staff Sparks Growth, Profitability, and Scalability, Jennifer Goldman

Chapter 13 ROI—The Holy Grail of the Technology Purchase Decision, Timothy D. Welsh

Chapter 14 Building an Efficient Workflow Management System, David L. Lawrence

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Editorial Review

From the Inside Flap

How to transform and streamline your practice and achieve bold new levels of efficiency, service, and profitability

Sick and tired of spending more time wrangling paperwork and managing your office than serving clients? Is overhead eating up your profit margins? Don't sweat it: This book has the answers to your problems.

This much anticipated update of the book that has become the financial advisor's technology bible delivers the technologies, workarounds, and procedural efficiencies you need to drastically reduce your paperwork, slash your overhead, and find anything you need in seconds—while growing your business, building your brand, and boosting your profits.

Featuring contributions from an all-star team of experts that's a virtual "Who's Who of Technology for Financial Advisors", this book gives you what you need to know to take your practice to a bold new level of professionalism and efficiency. You'll find:

- Non-biased, in-depth reviews of all the CRM systems on the market, with guidance on choosing the ideal one for your practice
- The latest in financial planning and portfolio management software and how to choose the best programs for your clients and grow your business
- Guidelines for seamlessly integrating your software systems for greater efficiency, lower costs, and bigger profits
- The lowdown on The Cloud, how it's revolutionizing the financial planning industry, and how switching to a cloud-based IT infrastructure can save you big bucks
- Guidance on how to use the Web and social media to grow your business, with tips on how to manage your online presence
- A road map for making the transition from a brick-and-mortar to a digital firm—with expert advice on how to build and manage a virtual staff
- Proven methods for accurately calculating the return on your technology investments, along with solid budgeting tips

In today's shaky economic environment, the rule for financial advisors is "evolve or perish." Arming you with cutting-edge strategies and tools for evolving your practice and dramatically increasing your efficiency, customer service, and profitability, *Technology Tools for Today's High-Margin Practice* holds the key to your professional survival.

From the Back Cover

Praise for *Technology Tools for Today's High-Margin Practice*

"Drucker and Bruckenstein have brought together the industry's top tech minds to create a road map for advisors looking to achieve scale and profitability through better use of technology. Dave and Joel have the

exceptional ability to see the 'bigger picture' and provide a fresh perspective on how advisors can maximize their technology investments."
—Tom Nally, President, TD Ameritrade Institutional Board of Trustees, Foundation for Financial Planning

"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. This book is an excellent resource for any advisor focused on running an efficient and profitable business."
—John J. Bowen, founder and CEO, CEG Worldwide, LLC; columnist, *Financial Planning* magazine

"*Technology Tools* is an invaluable addition to your practice. Buy it! Read it! Implement it! Profit!!"
—Harold Evensky, CFP®, AIF®, President, Evensky & Katz Wealth Management

"Like many others, for years I have relied upon Dave and Joel for timely, relevant and practical advice on the ever-changing world of useful technology for financial planners. The 2013 edition of *Virtual-Office Tools for a High-Margin Practice* delivers like no other before it by assembling the perspectives of several experts. I became more productive almost instantly just from reading Bill Winterberg's chapter on collaboration tools. Any practitioner contemplating their next technology choices would be well served by getting a copy of this book."
—Dan Moisand, CFP®, Principal and Senior Financial Advisor, Moisand Fitzgerald Tamayo, LLC and former Chairman, Financial Planning Association (FPA)

"*Technology Tools for Today's High-Margin Practice* is an excellent reference book for any firm looking to improve its operations and margins. David and Joel have assembled some of the most knowledgeable people in our industry on a broad range of technology and operational topics. The format of the book is easy to read and the coverage of each topic is extensive. This book is a must-have reference for firms of all sizes."
—Charles Goldman, CFP®, cofounder, Advizent; board member, CFP® Board of Standards; board member, Personal Capital

About the Author

David J. Drucker, MBA, CFP®, has more than thirty years of experience in the financial services industry. He is the coauthor of *Tools and Techniques of Practice Management* and *Virtual-Office Tools for a High-Margin Practice*: *How Client-Centered Financial Advisers Can Cut Paperwork, Overhead, and Wasted Hours* (Bloomberg Press, 2002). He is also editor of the monthly newsletter *Technology Tools for Today* (T3) and cofounder of the Annual T3 Technology Conference for financial advisors. David started his own advisory firm in the Washington, DC area in 1981 and continues to manage the financial affairs of a limited number of high-net worth clients.

Joel P. Bruckenstein, CFP®, is an internationally renowned expert in the field of applied technology for financial service professionals. In addition to serving as the publisher of the *Technology Tools for Today* (T3) newsletter, Joel is a technology columnist for *Financial Planning* magazine and *Financial Advisor* magazine. Joel is the coauthor of *Tools and Techniques of Practice Management* and *Virtual-Office Tools for a High-Margin Practice*: *How Client-Centered Financial Advisers Can Cut Paperwork, Overhead, and Wasted Hours* (Bloomberg Press, 2002). He is also the cofounder of the Annual T3 Technology Conference for financial advisors. Further information about Joel and T3 can be found at www.technologytoolsfortoday.com.

Users Review

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Leslie Martin:

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