LEGACY LAB

Your Key To Future-Focused Growth

WASHINGTON AVENUE ADVISORS

TECH IMPLEMENTATION PLANNER

Find new technology offerings that can increase your value proposition, elevate your client service model, streamline, and scale your business processes. Need help? Consider using the Ideal Client Persona Toolkit.

Your Ideal Client(s)

Review Advisor Technology Solution Categories

Based on your goal(s), select advisor technology solutions that you would like to consider adding to your tech stack.
N/A – not applicable or don't want | ✓ - have and are happy
For the rest, prioritize your wants in order of importance

Operations Essentials		Financial Planning		Investment Management	
	CRM		Cash Management		401k Implementation
	Client File Sharing		Goal Planning		Investment Data/Analytics
	Billing		Mind Mapping		Model Marketplace
	Compliance		Planning Light		Trading & Rebalancing
	Document Management		Retirement Planning		Performance Reporting
	E-Signature		Student Loan		Portfolio Management
	Forms Management		Tax Planning		Proposal Generation
	Managed Service Provider		Education Planning		Rebalancing Only
	Digital Onboarding		Estate Planning		Tisk Tolerance
	Virtual Assistant		Legacy Planning		Stress Testing
	Workflows		Other:		Other:
	Human Resources				
	Other:				

Operations Essentials		Financial Planning	
	Advice engagement		Advisor Lead Gen
	Client Note Taking		Business Intelligence Metrics
	Client Portal		Digital Marketing
	Client Survey/Feedback		Website
	Ongoing Plan/Monitoring		Other:
	Meeting Schedule Apps		
	Virtual Meeting		
	Behavioral Assessments		
	Client Data Gathering		
	Other:		

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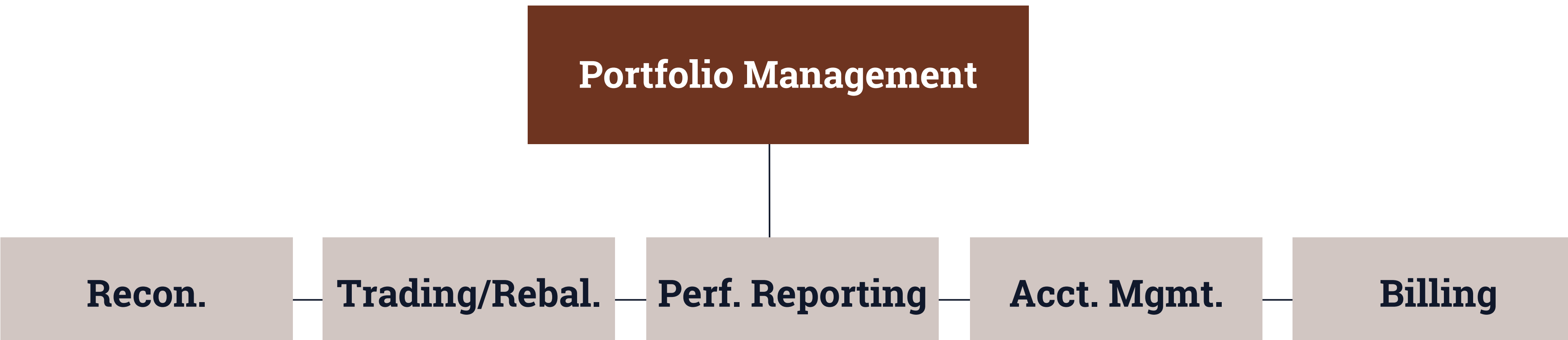
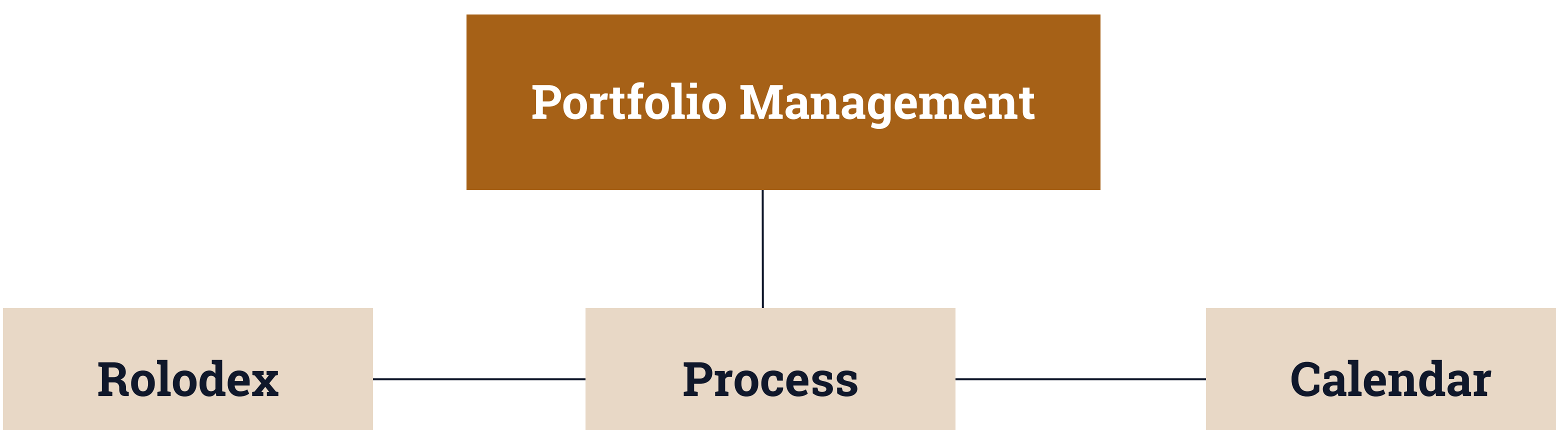
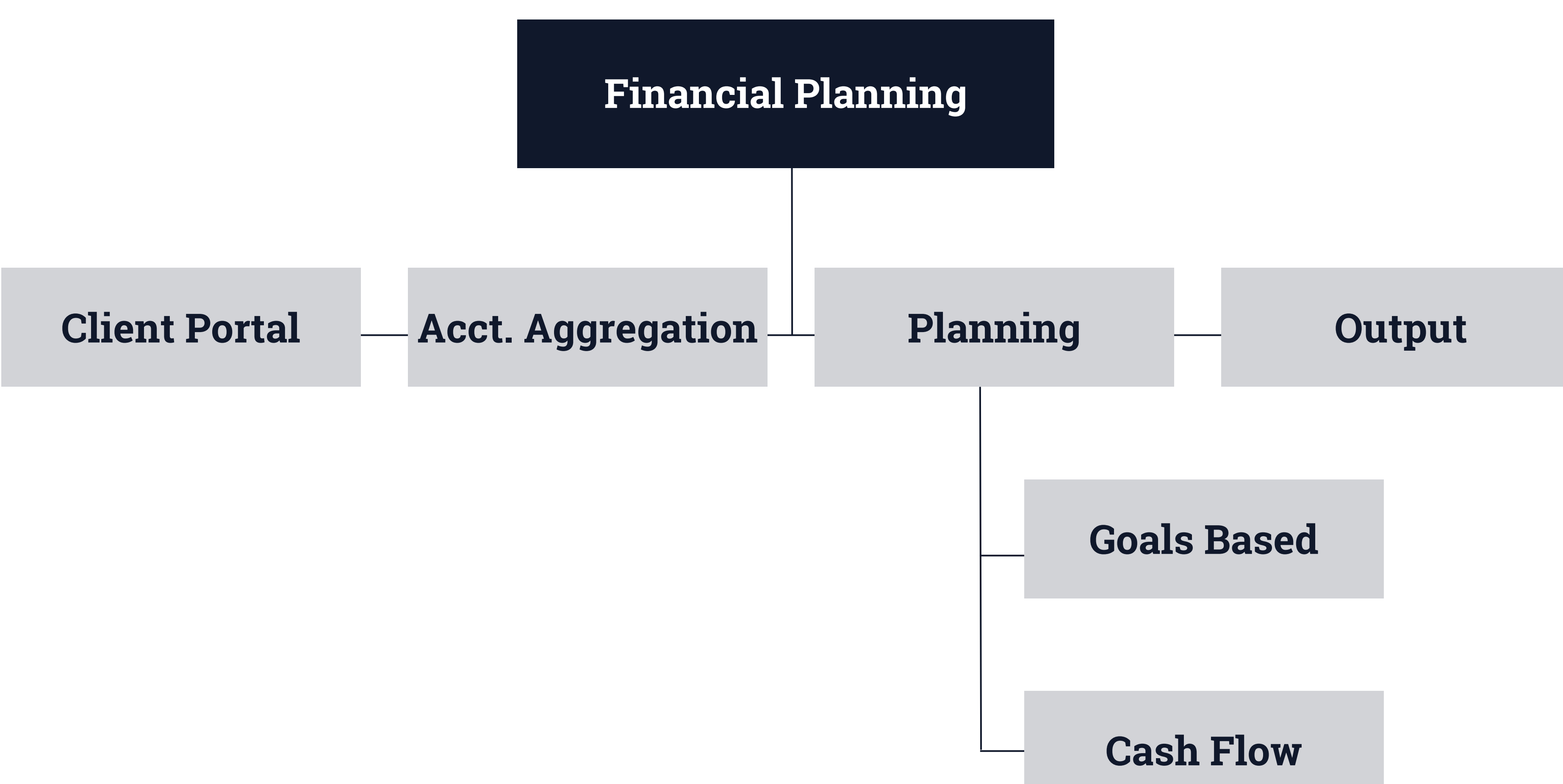
THREE PILLARS OF ADVISOR TECH

Consider this: What are you missing? What do you want to amplify?







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