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Hardcover ISBN: 978-1-118-43476-5 January 2013 $60.00

DESCRIPTION

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

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.