

## NEWS

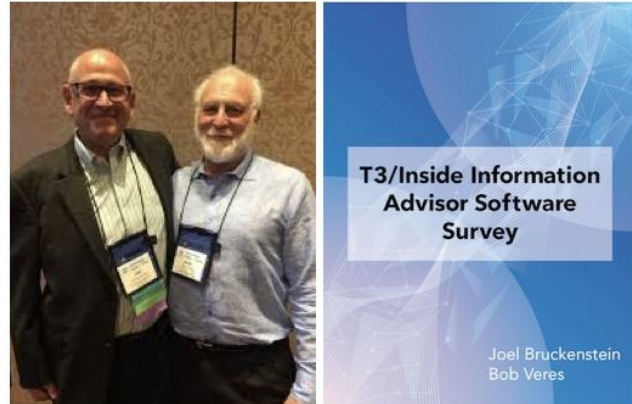
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# Financial Advisor Software Survey Results Unveiled at T3 Conference in San Diego

*Bob Veres and Joel Bruckenstein analyze sentiments  
and satisfaction revealed in annual study of  
financial planning professionals*

February 29, 2020 [SAN DIEGO, CA] -- In the largest survey of its type in the industry, Bob Veres ([www.bobveres.com](http://www.bobveres.com)) and Joel Bruckenstein ([www.joelbruckenstein.com](http://www.joelbruckenstein.com)) shed new light on the market share of most software applications used by financial advisors as well as their satisfaction with these products. Veres and Bruckenstein released the 2020 report on February 18, 2020 in conjunction with the [T3 Technology Conference for Advisors](#) held at the Marriott Marquis in San Diego.

The annual survey is, at best, a snapshot of the recent past. The 2020 survey instrument collected data from advisory firms, anonymously, through the months of October, November and parts of December 2019.

This year, in an effort to be more comprehensive, the producers expanded the survey to include 20 different industry categories. This year's survey added more than 100 new programs and four new categories of software solutions. In addition, Veres and Bruckenstein took a deeper dive into four of the software categories: CRM, Financial Planning, Portfolio Management and Enterprise Content Management.

“We looked at the market share for the leading solutions broken down by their users’ years of experience, size and business models, Bruckenstein said. “We felt that this would be a more useful way for readers to determine which programs are most popular with which types of advisory firms—and in some cases, as you’ll see, there were clear preferences based on size, business model and years of experience. When you shop, you want to know which solutions are most popular with firms that look and act like yours does.”

In all, more than 500 different programs, services and solutions are covered in the survey report. The data is provided through nearly 100 detailed charts and graphs, each tightly organized to deliver what Veres and Bruckenstein believe to be helpful information in every relevant software category.

“The data is relevant to the people who make software decisions at advisory firms—the consumers in this ever-evolving marketplace who are charged with maintaining and upgrading their technology stack.” Veres said. “Any potential buyer or user of advisor technology is likely to get an education simply by being exposed to the more than 500 tools and resources rated, categorized or reader-added in the course of the survey.”

“Keeping up with the financial services professional technology sector is no easy task, and one could say the same for tech companies trying to adapt to the changing landscape of the financial planning profession,” Bruckenstein said. “Advisors are evolving, and they readily acknowledge that they are struggling to stay ahead of the technology knowledge curve. This annual software survey – along with our conferences, newsletters, speeches and articles – is our way of contributing to the profession.”

“We want to express our gratitude to the more than 5,100 members of the financial planning/investment advisory community for their willingness to spend ten or fifteen minutes of their time providing us with priceless data on our ever-evolving professional technology sector. And we want to express our gratitude to the sponsors of this year’s survey: Morningstar, Orion, and BillFin by Redi2 Technologies,” Veres said.

[Click here to view / download a copy of the T3/Inside Information Advisor Software Survey.](#)

## **ABOUT VERES AND BRUCKENSTEIN**

More information about Veres and Bruckenstein, respectively, is available at [www.BobVeres.com](http://www.BobVeres.com) and [www.JoelBruckenstein.com](http://www.JoelBruckenstein.com).