NEWS

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Technology Tools for Today

Live and In-Person!
Denton, Texas

Advisor Conference: May 2 – 4
Enterprise Day: May 5

T3 Announces Highly-Anticipated Return of its Annual Advisor Conference and Enterprise Day

Largest technology-focused events for the wealth management industry return with full agendas of value-added practice management sessions and demos for advisors and executives

Back-to-Back Events Offer Comprehensive Look at Innovation in AI, Financial Planning, FinTech, WealthTech and More

DALLAS, TX (March 15, 2022) -- Joel Bruckenstein, President of **Technology Tools for Today** (T3), has opened registration for the 2022 T3 Advisor Conference and Enterprise Day, marking the return of two of the most popular and valuable events in the annual wealth management calendar. The two events will be held back-to-back this year, providing attendees with an up-close look at the next generation of applications that will shape the future of the industry. The T3 Advisor Conference will be held from May 2 – 4, with T3 Enterprise Day occurring on May 5. Both events will be held at the Embassy Suites by Hilton Denton Convention Center in Denton / Dallas, Texas, and are open to financial services executives who support financial advisors and financial advisors who work directly with clients.

Journalists are invited to request a press pass.

While the theme this year is advisor technology in a post-Covid world, T3 will incorporate a greater-than-ever emphasis on attendees' health and safety at the Texas events. For additional information on **COVID-19 protocols** at the events, please click here.

"We are thrilled to announce the return of two of the most highly-anticipated events in the wealth management industry with our 2022 T3 Advisor Conference and Enterprise Day," said Bruckenstein. "The camaraderie and energy of these events have been greatly missed, but – just as importantly – our conferences are coming back at a crucial time. As FinTech and WealthTech continue their rapid evolution and come to play an increasingly vital role in the lives of enterprises, advisors and investors alike, it is critical for the members of our industry to have a place to come together, discuss the latest innovations across the tech stack, and discuss what the future holds for their organizations and their clients."

CONFERENCE HIGHLIGHTS

- **Jenny Johnson**, President and CEO of Franklin Resources, the parent company of Franklin Templeton, will speak about shifts in consumer sentiment, trends in the wealth management industry, and advances in fintech

- **Eric Clarke**, CEO at Orion Advisor Services, and **Dr. Daniel Crosby**, Chief Behavioral Officer at Orion Advisor Solutions, will be speaking on the intersection between technology and behavioral finance

- **Neesha Hathi**, Chief Digital Officer, Managing Director at Charles Schwab, will speak about shifts in consumer sentiment, trends in the wealth management industry, and advances in fintech

- **Shirl Penney**, Chief Executive Officer of Dynasty Financial Partners, and **Brian Hamburger**, President and Chief Executive Officer of MarketCounsel, will reveal the most significant operational changes facing RIAs

- Podcast stations and video crews provided by ***Advisorpedia, InvestmentNews*, C-Suite Social Media, Three Crowns Copywriting and Marketing, and Impact Communications** will be onsite to capture all the relevant content and key insights from speakers, sponsors, and attendees

- **Bob Veres**, Editor and Publisher of *Inside Information*, and **Joel Bruckenstein**, founder/president T3, in a much anticipated session will unveil the results of the annual **T3/Inside Information software survey**. This survey, which synthesizes the results of months of analysis of critical data submitted by thousands of respondents, is regarded as the most statistically viable report on critical technology trends in the wealth management profession.

"I know I speak for professionals all across the financial planning, wealth management and technology communities when I say, 'Welcome back, T3,'" said Veres. "While technology has helped us make it through the last couple of rough years, there is no substitute for in-person interactions when it comes to discussing the most important tech trends in the financial planning community and wealth management space. We look forward to advancing those conversations with the results of this year's software survey."

"This conference would not be possible without the enthusiastic support of our sponsors," Bruckenstein said. "The **sponsor page on the T3 website** reads like a Who's Who list of fintech talent – and coming to T3 allows advisors and enterprises to speak directly with the innovative technicians and software engineers who are leading the way and creating the incredible technology that will continue to support the next phases and evolution of the profession."

CAN'T MISS EVENT ADDRESSES REAL-WORLD CHALLENGES

T3 has built on its history as one of the "can't miss" industry events of the year by continually showcasing relevant solutions that address real-world business challenges for financial advisors and their clients. In a 2021 industry survey produced by *Inside Information*, the T3 Conference ranked "#1 in Technology Implementation Ideas" based upon responses from practicing advisors. The conference also scored among the highest in overall satisfaction by past attendees.

As Michael Kitces, publisher of the *Nerd's Eye View* blog, pointed out in his 2020 list of **Best Conferences for Financial Advisors to Choose from in 2020**, "The T3 advisor conference should be viewed as the best way to take in the entire landscape of the advisor technology ecosystem. Which is valuable both for financial advisors who are 'shopping' for new solutions – especially those making a transition to a more independent model, and trying to understand what may be available to them – as well as those who simply want to stay cutting edge and see the latest tools coming to the market."

"We could not be more excited about our upcoming T3 Advisor Conference and Enterprise Day," concluded Bruckenstein. "We are back – along with all the headline-making announcements and fascinating insights attendees have come to expect – and we're planning to make this year's events our biggest and best ever."

ABOUT TECHNOLOGY TOOLS FOR TODAY (T3)

The **T3 technology conference for financial advisors ("T3 Advisor")** is the largest of its kind; it is an event solely focused on technology solutions specifically for financial advisors and wealth management firms. In the early years (2005), Joel Bruckenstein, CFP®, and his then-partner David Drucker, CFP® (since retired), saw the need to bring the industry's leading pioneers and financial advisors and the technology creators together, once a year in person. The goal was to advance the adoption of technology, educate advisors, and to create the best outcomes for investment advisory companies and the financial planning profession.

As advisor tech-adoption grew, the **T3 technology conference for enterprises ("T3 Enterprise")** was established to help financial services executives uncover new solutions for their firms (credit unions, banks, broker/dealers, custodians, RIA networks, insurance agencies, etc.), as they seek to secure and improve their value proposition to the financial advisors they serve.

The **T3 Technology Hub, a digital repository of technology announcements and commentary**, became a reality somewhere along the way, replacing the old T3 newsletter which at the time Bruckenstein and Drucker were producing it was filled with cutting edge information and emailed to subscribers as a PDF. One of the early Bruckenstein/Drucker books (and many of the early T3 conferences) focused on creating a paperless office via scanning and digital storage on the advisor's own computers. That was then. This is now. My how far we've come. Terms like cloud native, portal, workflow and CRM, digital advisor, and tech stack are now a part of our vernacular.

To learn more about the upcoming T3 events – including the Spring BOGO Sale for advisor tickets (ends at 11:59pm ET on April 1, 2022) – visit **www.T3Conferences.com**.

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