NEWS

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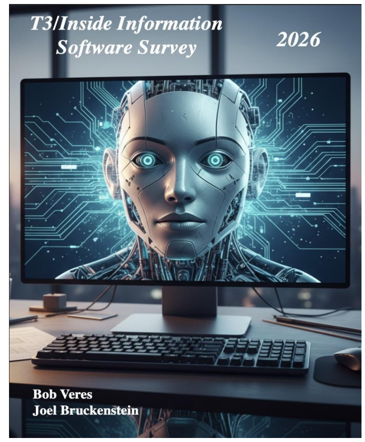

Live from T3: Key Wealthtech and AI Findings from the 2026 T3 / Inside Information Software Survey

Bruckenstein and Veres report: Only half of the 2,906 respondents say they are using any search or generative AI

NEW ORLEANS, LA (March 10, 2026) – Joel Bruckenstein of **Technology Tools for Today (T3)** and Bob Veres of **Inside Information** presented their initial findings from the 2026 T3 / Inside Information Software Survey in front of a live audience during their late afternoon conference session on Tuesday, March 10, 2026. Financial services professionals from across the country are at the Hyatt Regency in New Orleans, Louisiana, attending T3's 22nd annual fintech conference happening March 9-12, 2026.

To download a PDF of the complete survey report, visit www.T3TechnologyHub.com and/or www.BobVeres.com.

With 2,906 responses explicitly from members of the financial planning and investment advisory community, the 2026 survey yet again shines as one of the most comprehensive data sets in the wealthtech marketplace. Participants provided input across 70 different categories, revealing market share trends, advisor preferences, and average user satisfaction ratings.

In all, more than 800 different programs, services, and solutions are covered in the report. The data is provided through 153 charts and graphs, each organized to deliver what they believe to be helpful information in every relevant category.

MOST EXCITING FINDINGS

"Perhaps the most exciting part of the survey is the category we added: AI Notetaking Solutions. We were able to identify 14 of them this year, up from exactly one last year, and their aggregate market share, in one year, mind you, reached 42.86%. It's probably over 60% now, given the rocket-like trajectory," explained Veres, noting that Jump was shoehorned into other categories last year.

Market share was looked at according to participant years of experience, business model (fee-only, dually-registered, wirehouse), and size of firm.

“We expected that younger advisors would be all over the AI notetakers while the older advisors and larger firms would be more cautious. We did not find that to be true in the data,” recalls Veres.

More than 43% of the firms with more than $8 million in annual revenues were using these tools, compared with 32% for the smallest firms in our survey. Advisors with 20 years of experience were incrementally more likely to report using one of these tools than advisors with 1-5 years of experience.

The survey is always evolving to accommodate the rapid innovation of the financial advisor / financial services landscape. In addition to this year’s new AI notetaker category, in 2025 alternative platforms, generative language AI, search AI, and graphics AI were introduced and measured for the first time in this much-anticipated and highly-respected survey.

This year, 52% of advisors are using one or more search or generative AI tools, compared to only 41% in 2025. ChatGPT still holds the largest market share (40.92%), followed by Microsoft Copilot (20.51%), Google Gemini (13.63%), Perplexity (6.95%), and Anthropic (6.16%). Grok was incorporated into this year’s study (6.13% of the market share). Apple Intelligence decreased from 2.58% in 2025 to 1.34% in 2026. Samsung AI and Mistral AI came in last, both with 0.21% of the 2026 market share.

SURPRISE FINDINGS

“Joel and I are eternally surprised at some of the aggregate market share numbers: the percentage of respondents who are using at least one of the solutions in each category. 91.08% of respondents report using one of the 17 CRM solutions we asked about (from market leader Orion down to Advisors Assistant with 0.14% market share) — and we would have thought this would be close to 100% (it was above 96% in 2023). Only 83.30% of respondents are using financial planning software, and that has been pretty consistent for the life of the survey,” Veres remarked.

Advisor participants were asked to rank their most valuable software. CRM was most valuable, followed by Financial Planning, Portfolio Management, Trading/Rebalancing, Investment Analytics and Data (i.e., Morningstar Workstation, the category leader), Document Management (i.e., eSignature solutions and eFiling on the desktop), and finally Risk Tolerance.

“By the way, Altruist’s Hazel AI solution had not been announced when we launched the survey, so of course it wasn’t included. But it attracted enough write-in votes that it would have finished third in market share in our survey,” continued Veres. “The full report contains more details and data on this category and more. “

In addition, 55.58% of respondents are using one of the Social Security Analysis tools, which, according to Veres, “suggests that more than half of advisors are giving their clients advice on their Social Security options. We believe that solution utilization equals service provided to clients.” Using this figure, along with data for Estate Planning (53.60%), Tax Planning (52.53%), and College Planning (45.54%), Veres and Bruckenstein conclude that, seemingly, advisory firms are gradually offering more comprehensive advice in various areas of their clients’ lives.

“Less optimistically, only 18.49% of advisors are using one of the Retirement Distribution Planning tools and seem to rely more on Monte Carlo analysis, which is far less sophisticated than what Income Lab or Retirement Analyzer are offering,” Veres said.

Other Highlights

- Only 3.27% of the respondent firms are implementing a data warehouse approach to their tech stack. Veres calls it “the bleeding edge of the fintech world.”

- 21.69% of respondent firms are using one of the 12 listed cybersecurity firms. “That’s disappointing, and it has been consistent through the life of our survey,” remarks Veres.

- This survey had 2,906 respondents, compared to the 2,218 in 2025.

“The survey fills a couple of needs in the profession.” According to Veres, “It gives the fintech world a chance to compare notes (and features) and also to get an objective user rating from the planning community. Second, it serves as a buyer’s guide for advisory firms that want to add new capabilities or switch what they have for something with a higher user rating and more features.”

Noting the diversity and versatility of each category, “This survey is eye-opening to the possibilities.” Veres continued, “I suspect few advisors are familiar with the full extent of the expansion of their fintech ecosystem, or the tools that they could be adding to meet the needs of staff and clients. We say that simply taking the survey is an educational experience all in itself.”

The report includes data pulled from previous years’ surveys to measure which software and solutions are gaining market share and tracks changes in user satisfaction ratings.

SUPPORT FOR THE SURVEY

This year’s survey would not have been possible without the generous support provided by:

- Advyzon
- FP Alpha
- Jump
- Orion
- Practifi
- SEI

ABOUT JOEL BRUCKENSTEIN

Joel P. Bruckenstein, CFP®, is a globally recognized authority in the field of applied technology for financial professionals. He is renowned as the Publisher of Technology Tools for Today (T3), formerly known as Virtual Office News and now known as the T3 Tech Hub. As the driving force behind the esteemed T3 Technology Conference for the financial services realm, Bruckenstein has established it as the preeminent technology event for independent financial advisors, executives from independent broker/dealers, and executives from large registered investment advisory firms. The conference also welcomes industry trade journalists, private equity firms, and asset managers that support the wealthtech ecosystem.

For over two decades, Bruckenstein has been advising financial service firms of all sizes, aiding them in enhancing their technological infrastructure, streamlining processes, and optimizing workflows. Bruckenstein's contributions extend beyond consultancy. He has co-authored three notable books: "Virtual Office Tools for a High Margin Practice," "Tools and Techniques of Practice Management," and "Technology Tools for Today's High Margin Practice." Furthermore, he has served as a monthly technology columnist for esteemed publications such as *Morningstar Advisor, Financial Advisor* magazine, and *Financial Planning* magazine.

In collaboration with industry luminary Bob Veres, publisher of Inside Information, Bruckenstein spearheads the annual technology survey tailored exclusively for the financial planning community. Recognizing Bruckenstein's immense impact and leadership, he was honored with the fifth annual Leadership Award at Bob Veres' Insider's Forum. This prestigious conference unites the most influential figures in the financial planning profession, and Bruckenstein received the award during a prominent main stage presentation at the Insider's Forum held in September 2017.

Learn more about Bruckenstein at **www.JoelBruckenstein.com**.

ABOUT BOB VERES

Bob Veres is editor and publisher of the Inside Information interactive guide to trends and innovations in the profession. In addition, he is a sought-after speaker for many of the planning world's most important professional conferences, and co-produces the Insider's Forum conference for independent financial advisory firms.

Veres has been named one of the most influential people in the financial planning profession by *Investment Advisor* magazine and *Financial Planning* magazine, was granted the Special Achievement Award for service to the profession by the National Association of Personal Financial Advisors, and the Heart of Financial Planning Distinguished Service Award from the Denver-based Financial Planning Association.

Over his 30-year career in the financial services world, Veres has worked as editor of *Financial Planning* magazine; as a contributing editor to the *Journal of Financial Planning*; as a columnist and editor-at-large of *Investment Advisor* magazine; and as editor of Morningstar's advisor web site: MorningstarAdvisor.com. As a journalist, he has won several national awards, including the Jesse H. Neal Award from the American Business Media group, considered the most prestigious editorial honor in the field of specialized journalism, and the Azbee Award of Excellence from the American Society of Business Press Editors.

Learn more about Veres at **www.BobVeres.com**.

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