

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Kwanti Earns High Customer Satisfaction Ratings in 2024 Advisor Software Survey from T3 Technology Tools for Today and Inside Information

In addition, portfolio analytics solution named Wealthtech Firm of the Year in Wealth Solutions Report's 2024 Wealth Exemplar Awards

SAN FRANCISCO, CA (February 13, 2024) – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently achieved high client satisfaction ratings across multiple categories in the [2024 T3 / Inside Information Software Survey](#) – including earning the highest rating in the Investment Data/Analytics Tools category for firms with more than 5% market share, as well as the highest rating in the Economic Analysis & Stress-Testing Tools category for firms with more than 3% market share.

The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Technology Conference](#), which took place January 22nd – 25th in Las Vegas and saw over 1,000 total attendees. The survey is one of the most widely respected and referenced attempts to quantify what technology advisors are using, what they want to see more of, and which solutions they like best. Technology firms are ranked based solely on advisor input.

“We’re excited to yet again achieve high ratings in this industry-leading survey and report,” said Christophe Gauthron, Founder and CEO of Kwanti. “We love hearing that our clients are highly satisfied with our platform and solutions – these results confirm what we hear from the advisors who subscribe to our system every day.”

STEADILY GAINING MARKET SHARE BASED ON MERIT

The report dubbed client satisfaction ratings higher than 8.0 “remarkable” in its summary findings, noting that Kwanti has “made a tradition of living in the rarified 8.00 user ratings club”.

Kwanti received the highest client satisfaction rating (8.27) in the Investment Data/Analytics Tools category for firms with more than 5% market share, with their market share increasing from 5.53% to 5.79% – good for fifth overall.

The report noted: “Kwanti has steadily gained market share on merit, based on its consistently high user rating, and should be considered by advisors who are looking to add portfolio analytics to their asset management services.”

In addition, Kwanti scored the highest client satisfaction rating (8.33) in the Economic Analysis & Stress-Testing Tools category for firms with more than 3% market share, with their market share increasing from 4.41% to 4.63% – good for fourth overall.

Kwanti was also named often in the ‘Programs Respondents Are Considering’ section within these categories, with the report noting that the firm is “gaining increased attention from advisors who are considering a solution in this category.”

Thanks to their outstanding ratings, the report dubbed Kwanti a “Software All Star”, recognizing solutions that finished in the top eight of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating. Only four other firms besides Kwanti qualified for the “Software All Star” list in multiple categories.

“I think we continually achieve top marks year after year because we have always and will continue to approach development and innovation with an advisor-first mindset,” said Gauthron. “While many software solutions talk about how much they listen to advisor requests, we continually follow through and put the most asked-for items into action.”

To see the full T3 / Inside Information Software Survey results, with insights and analysis from Veres and Bruckenstein, [please click here](#).

COMBINING POWERFUL ANALYTICS AND PROPOSAL GENERATION TO OPTIMIZE TIME AND RESOURCES

Kwanti delivers portfolio analytics, stress testing, and proposals for advisors and investment professionals, assisting with prospect conversion, client acquisition and retention, and model management. The web-based software and fintech solution allows advisors to balance serving clients well and managing portfolios with data-driven expertise.

Users can elegantly showcase portfolio recommendations to centrally position themselves in client relationships and close business with prospects, as well as leverage data integrations with leading custodians and portfolio management platforms to streamline the client management process.

Within the past year, Kwanti has introduced multiple updates and enhancements to their industry-leading portfolio analytics platform:

- [Kwanti Screener](#), which allows advisors to screen for best performing assets and find the right investment opportunities for clients, saving them time in the process.
- [Model Portfolio Tracking](#), which allows advisors to add a model portfolio's history of changes to achieve a more realistic illustration and performance calculation.
- [Tax Drag Analysis](#), which allows advisors to identify hidden portfolio expenses and tax liability.

One of the main reasons Kwanti has attended the T3 Conference for the last 10+ years is to interact and connect with their many integration partners, which include Pershing, Schwab, TD Ameritrade Institutional, Fidelity, Advyzo, Orion, Redtail, Black Diamond, WisdomTree, BlackRock, State Street, Riskalyze, TradePMR, Addepar, Folio Institutional, and more.

At the 2024 conference, Kwanti was positioned next to their latest partner in the exhibit hall: Altruist, a modern custodian built exclusively for RIAs. The two firms [recently announced a data-sharing integration](#), where advisors using Altruist can link their accounts to Kwanti in order to view actual performance data – reconciled daily for their Altruist accounts – and leverage Kwanti's comprehensive suite of analytics.

Kwanti offers a free 30-day trial, with no software to install and all features available during the trial. Financial advisors and other interested parties can [click here to sign up for the free trial](#) or [click here to watch a demo](#).

KWANTI NAMED WEALTHTECH FIRM OF THE YEAR BY WEALTH SOLUTIONS REPORT

Building on their success in the T3 / Inside Information Software Survey, Kwanti was recently named a [Wealthtech Firm of the Year](#) in Wealth Solutions Report's 2024 Wealth Exemplar Awards.

“The WSR Wealth Exemplar Awards Wealthtech Firm of the Year goes to the top three firms providing technology solutions for firms that operate within the non-institutional wealth management space,” said Chris Latham, Managing Editor at Wealth Solutions Report. “At minimum, winners must serve \$250 million in assets.”

Kwanti was recognized due to many noteworthy accomplishments in 2023, including significant updates and enhancements to the platform, high client satisfaction ratings in multiple industry surveys and studies, and high retention and growth rates.

To learn more and see the rest of the award winners, [please click here](#).

ABOUT KWANTI

Founded by Christophe Gauthron, CFA®, and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit www.Kwanti.com.

###