

# NEWS

For Immediate Release

**Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

[JonnySwift@ImpactCommunications.org](mailto:JonnySwift@ImpactCommunications.org)



## **Libretto Earns High Customer Satisfaction Ratings in 2026 Advisor Software Survey from T3 Technology Tools for Today and Inside Information**

*‘Total wealth’ advice platform and founder Jeffery Coyle also  
recognized in various industry awards*

LOS ANGELES, CA (May 26, 2026) – [Libretto](#), the “total wealth” advice platform for RIAs and family offices, recently achieved high client satisfaction ratings in the [2026 T3 / Inside Information Software Survey](#)<sup>1</sup> – a widely referenced study in the wealthtech industry. Libretto earned the highest user satisfaction rating among firms with more than 1% market share in the Financial Planning Software and Portfolio Design Solutions categories.

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 2026 T3 Technology Conference, which took place March 9-12 in New Orleans and saw over 1,000 total attendees. The survey is one of the most widely 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 on advisor input.

“We’re excited to again achieve strong customer ratings in this insightful industry report,” said **Jeffery Coyle**, Founder and CEO of Libretto. “It’s rewarding to hear that advisors value our platform, and we’re looking forward to continuing to innovate the product in partnership with our users.”

In the Financial Planning Software category, Libretto earned an 8.50 rating – the highest in the category for firms with more than 1% market share – which earned Libretto a ‘Mighty Mite’ designation<sup>1</sup>. The report noted that Libretto “offers a very different take on how to structure a financial plan.”

In the Portfolio Design Solutions category, Libretto earned an 8.72 rating – the highest in the category for firms with more than 1% market share – which earned Libretto a ‘Software All Star’ designation<sup>1</sup>, recognizing firms that achieved strong ratings and finished among the top of their category in market penetration. The report called Libretto’s rating “eye-catching,” noting that “the Libretto planning program recommends client asset mixes directly from its planning engine.”

To see the full T3 / Inside Information Software Survey results, with insights and analysis from **Bob Veres** and **Joel Bruckenstein**, [please click here](#). Survey results reflect respondent opinions, may not be representative of all users, and are not indicative of future results. Libretto from time to time sponsors T3 and Inside Information events. See endnote 1 for methodology and disclosures.

## **NEW AI-POWERED FEATURES ANNOUNCED AT T3 CONFERENCE**

In addition to the survey results unveiled at the T3 Conference, [Libretto announced new AI-powered features](#) at the conference designed to streamline planning, asset allocation, and risk management. Chief among these features is Libretto's AI-automated client onboarding tool, which populates new client strategies from scratch using uploaded client data files. The AI-automated client onboarding tool is designed to help advisors scale sophisticated advice across their full client base.

Beneath the hood, Libretto uses AI to extract family details, goals, income, account balances, and other planning data from uploaded files. Libretto's proprietary knowledge engine then applies embedded best practices to transform that data into a draft client strategy. The automated client onboarding workflow allows advisors to spend less time typing and more time focusing on what matters most: their advice.

Following the AI-automated data entry workflow, Mert – Libretto's AI assistant – helps advisors review, refine, and communicate each client's strategy. From within any client's strategy, advisors can use Mert as a thinking partner to help answer important questions. In addition to client data, Mert has access to Libretto's extensive knowledge base, which contains 150+ articles on topics ranging from system best practices to guidance on liability-driven investing, risk management, and total wealth planning. These resources enable Mert to provide context-aware guidance tailored to each client's unique situation.

Together, the AI-automated data entry tool, Mert, and Libretto's knowledge engine create an integrated workflow for building sophisticated client strategies. The data entry tool accelerates onboarding, Mert provides guardrails and analytical support, and Libretto's personalized client letters help advisors clearly communicate recommendations to clients and prospects.

To learn more about Libretto's new AI features, [please visit the Libretto website](#).

## **LIBRETTO NAMED FINALIST IN FAMILY WEALTH REPORT AWARDS 2026**

In addition to the strong survey ratings in the T3 / Inside Information report, Libretto has been recognized in a handful of industry awards programs in recent months.

In the [2026 Family Wealth Report Awards](#)<sup>2</sup>, presented by WealthBriefing and ClearView Financial Media, Libretto was named a finalist in two categories: Client Communications and Innovative Product or Service. According to WealthBriefing, the Family Wealth Report Awards celebrate achievements of its private client, family office and wealth management communities.

Libretto was recognized in part thanks to its [Personalized Client Letters](#), which enable advisors to generate personalized, graphic-rich, white-label client letters with the click of a button. Designed to help advisors deliver personalized advice at scale, the letters combine the consistency and accuracy of Libretto's proprietary knowledge engine with additional personalization enabled by generative AI. The resulting letters help clients understand and visualize their financial situations,

and advisors can use these materials to embed personalized narratives into post-meeting follow-ups, quarterly reports, and annual reviews.

To learn more about the Family Wealth Report Awards and see the full list of winners and finalists, [please click here](#). Recognition is based on third-party award criteria and is not indicative of future results, performance, or the skill of any advisor using Libretto. No compensation was provided for obtaining this recognition; however, after being selected as a finalist, Libretto paid a small fee for distribution and promotional rights. See endnote 2 for methodology and disclosures.

## **LIBRETTO WINS 2025 DATOS IMPACT AWARD IN WEALTH MANAGEMENT**

Toward the end of 2025, Libretto was named the winner of the ‘Best Innovation in Financial Planning’ award in the [2025 Datos Impact Awards in Wealth Management](#)<sup>3</sup>, presented by Datos Insights. According to Datos Insights, the awards recognize 24 organizations whose innovations are helping transform how wealth management firms serve financial advisors and clients across the evolving financial landscape.

Libretto was recognized in the Financial Planning category thanks to its differentiated approach to “total wealth” planning and investing, as well as the release of the Client Letters feature that allows advisors to efficiently deliver personalized advice at scale.

To learn more about the Datos Impact Awards in Wealth Management and see the full list of winners, [please click here](#). Recognition is based on third-party award criteria and is not indicative of future results, performance, or the skill of any advisor using Libretto. See endnote 3 for methodology and disclosures.

## **JEFFERY COYLE RECOGNIZED IN WEALTHTECH AMERICAS AWARDS AND INVESTMENTNEWS HOT LIST**

In addition to recent recognition for the firm, Libretto founder [Jeffery Coyle](#) was recently recognized in multiple industry awards programs. In the [2026 WealthTech Americas Awards](#), presented by WealthBriefing and ClearView Financial Media, Coyle was named the winner of the ‘Lifetime Achievement’ award<sup>4</sup>, highlighting his contributions to the wealth management industry throughout his career.

Coyle is a former advisor with over 25 years of experience managing ultra-high-net-worth clients and over 30 years of experience pioneering innovative approaches to wealth management. Over his career, he founded three boutique advisory firms delivering to ultra-affluent private clients. He also served as Deputy Chief Investment Officer of Personal Financial Services for Northern Trust and was Chief Strategy Officer at myCFO.

Jeff founded Libretto to help advisors scale sophisticated advice to their largest and smallest clients alike. Built upon Jeff’s experience working with wealthy families, Libretto brings liability-driven planning, asset allocation, and risk management tools to advisors serving clients at every wealth level. Ultimately, Libretto’s mission is to help financial advisors make every client feel like they’re worth \$100 million.

The WealthTech Americas Awards program recognizes WealthTech companies serving the North American and Latin American family office and wealth management industries. To learn more

about the WealthTech Americas Awards and see the full list of winners and finalists, [please click here](#).

Coyle was also recognized in the [2025 InvestmentNews Hot List](#)<sup>5</sup>, featuring exceptional wealth professionals in the US. He was selected for this list based on the new features and enhancements introduced to the Libretto platform in 2025; his thought leadership and insights that were published in numerous industry publications and shared at multiple industry conferences last year; recent awards and recognition received by Libretto; and Libretto's differentiated planning methodology.

To learn more about the InvestmentNews Hot List and see the full list of honorees, [please click here](#).

Recognition is based on third-party award criteria and is not indicative of future results, performance, or the skill of any advisor using Libretto. No compensation was provided for obtaining these recognitions; however, after Jeff was selected as a winner for the 2026 WealthTech Americas Awards, Libretto paid a small fee for distribution and promotional rights. See endnotes 4 and 5 for methodology and disclosures.

## **ABOUT LIBRETTO**

Libretto is a powerful advice platform that helps financial advisors make every client feel like they're worth \$100 million. Originally built to manage ultra-affluent clients, Libretto brings advanced liability-driven planning, asset allocation, and risk management tools to advisors serving clients at every wealth level. Libretto scales "total wealth advice" across an advisor's full client base, making it easy for advisors to deliver sophisticated advice to both their largest and smallest clients. Learn more at [Libretto.io](#).

*Libretto is a registered investment adviser with the U.S. Securities and Exchange Commission ("SEC"); however, such registration does not imply a certain level of skill or training and no inference to the contrary should be made. Libretto provides advisory services to registered investment advisors and other professional advisors and does not advise individual clients. Individuals should consult their personal financial advisor or a licensed securities professional before investing. Information about Libretto, including the services provided, the types of clients Libretto accepts, and fees charged, is available on Libretto's Form ADV Part 2A, which can be obtained by going to [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

<sup>1</sup> *The 2026 T3 / Inside Information Software Survey was published on 3/10/2026. Survey responses, including user satisfaction ratings, were collected anonymously from advisory firm participants from 11/2025-2/2026. The 2026 survey included 2,906 responses. No direct compensation was provided to T3 or Inside Information in connection with the survey ratings. However, Libretto does from time to time sponsor T3 and Inside Information events as part of its general marketing activities, which can create a potential conflict of interest with respect to written analysis of survey results by T3 and Inside Information writers, including subjective recognitions such as the 'Mighty Mite' and 'Software All Star' designations earned by Libretto. The 'Mighty Mite' designation recognizes solutions that were not market share leaders, but whose user ratings stand out – specifically solutions that achieved an extraordinary (8.0+) average user rating. The 'Software All Stars' designation highlights solutions that finished among the top of their category in market penetration and also achieved an extraordinary (8.0+) average user rating. The survey results reflect respondent opinions and may not be representative of all users of the surveyed software categories.*

<sup>2</sup> *Libretto was named a Finalist in two categories of the 2026 Family Wealth Report Awards: Client Communications and Innovative Product or Service. The awards are presented by WealthBriefing and ClearView Financial Media, and the Finalists were announced on 3/26/2026. Winners were announced on 4/30/2026, and Libretto was not named a winner in either category. No compensation was provided for obtaining this recognition; however, after being selected as a finalist, Libretto paid a small fee for distribution and promotional rights related to the recognition. This recognition is not indicative of future results, performance, or the skill of any advisor using Libretto, and it should not be construed as an endorsement of Libretto by the award sponsor.*

<sup>3</sup> *Libretto was named the winner of the 'Best Innovation in Financial Planning' award for 2025 in the 2025 Datos Impact Awards in Wealth Management, presented by Datos Insights and published on 10/17/2025. The awards recognize 24 organizations whose breakthrough innovations are transforming how wealth management firms serve advisors and clients across the evolving financial landscape. Winners are selected based on submitted materials by a panel of wealth management industry experts and strategic advisors for Datos Insights. No compensation was provided directly or indirectly by Libretto in connection with this award. This recognition is not indicative of future results, performance, or the skill of any advisor using Libretto, and it should not be construed as an endorsement of Libretto by the award sponsor.*

<sup>4</sup> *Jeff Coyle, founder of Libretto, was named winner of the “Lifetime Achievement” award in the 2026 WealthTech Americas Awards, published 2/19/2026, presented by WealthBriefing. Jeff was selected by the WealthTech Americas team and a panel of independent judges based on submitted materials. No compensation was provided for obtaining this award, but Libretto did pay a small fee for distribution rights to the award after being selected as a winner. This recognition is not indicative of future results, performance, or the skill of any advisor using Libretto, and it should not be construed as an endorsement of Libretto by the award sponsor.*

<sup>5</sup> *Jeff Coyle, founder of Libretto, was named in the InvestmentNews Hot List for 2025, published 11/11/25, which highlights exceptional wealth professionals for 2025 as selected and researched by the InvestmentNews team based on submitted materials. No compensation was provided directly or indirectly by Jeff Coyle or Libretto for inclusion on this list. This recognition is not indicative of future results, performance, or the skill of any advisor using Libretto, and it should not be construed as an endorsement of Libretto by the award sponsor.*

###