

## NEWS

For immediate release



### Media Contact:

Marie Swift or Dori Thomas  
Impact Communications, Inc.  
913-649-5009

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

## Ezra Group Announces WealthTech Integration Score

### *New Industry Metric for Measuring Connectivity to Drive Better Decisions for Wealth Management Firms and Fintech Vendors*

NEW YORK, NY (August 16, 2022) – [Ezra Group, LLC](#) (Ezra Group), a boutique strategy consulting and research firm that provides technology and strategy advice to the wealth management industry, today announced a new research metric called [The Ezra Group WealthTech Integration Score™](#). This score was developed to support better decision-making when evaluating new technology.

“The goal of creating this score is to simplify the process of building a reliable and compatible technology stack and to bring more transparency to an area that is not well understood,” said [Craig Iskowitz](#), founder and CEO of Ezra Group. Iskowitz is a well-respected fintech business and technology strategy consultant who is recognized for his expertise and research on fee-based advisory platforms and wealth management technology.

“As leading industry consultants, our team has had hands-on experience integrating most of the applications on the Kitces AdvisorTech Map,” Iskowitz continued. “Our Integration Score distills a segment of our experience down into an easy-to-understand number designed to help compare applications.”

### KEY APPLICATIONS SCORED

Ezra Group developed a list of key applications to encourage highly rated platforms to offer the integrations that enterprise financial services firms, independent financial planners, and professional investment advisors need the most. The list, which includes CRM, financial planning, risk tolerance, proposal generation, portfolio management, rebalancing, reporting, data aggregation and more, is the result of comprehensive research on the most commonly used applications to complete a robust technology stack.

“During the scoring process, our research team looked for deep integrations with the set of key applications. By emphasizing this core set of applications, it ensures that higher-scoring products will contain more integrations to the most popular software used by advisors today,” said Iskowitz.

## **SCORING METHODOLOGY EXPLAINED**

Ezra Group developed a scoring methodology to ensure that the end results were objective and comparable across categories.

“One of the things we’re trying to promote is transparency. We would like vendors to put more integration information on their websites so anyone can access it, whether you’re a client, a partner, or a consultant, you can easily find it,” said Iskowitz during a [recent podcast interview](#) with industry luminary and marketing consultant [Marie Swift](#).

### **The scoring methodology relies on three criteria:**

- Breadth
- Depth
- Technical capabilities

Breadth, which makes up 15% of the score, takes into account how many integrations a vendor has built. A formula scores each product relative to the application with the most integrations in their category.

Depth, which makes up 60% of the score, starts with rating each integration on a five-point scale which ensures that vendors that have built deep integrations are scored higher than those that did not. It also rates products higher that have more connections to the key applications list. Using key applications as a guide ensures an application with a higher score will provide more value to advisors in the functionality that they use the most.

Technical capabilities, the final scoring criteria, looks at the critical features for network administrators and developers tasked with making everything work together. Security, API availability, and developer support are all considered and make up 25% of the final integration score.

Application vendors will be provided a badge – Superior or Excellent – to convey that their application scored at least a six or above. FinTech companies are encouraged to post their badge on their websites and marketing materials.

## **A WORK IN PROGRESS**

While the WealthTech Integration Score™ is being released to the financial services profession now, it is still a work in progress; the originators are committed to constant and never-ending improvement.

Ezra Group researchers used three surveys to develop the initial rankings; they are now open to considering feedback from those companies scored if scored application teams feel something has been missed. Ezra Group also plans to ask users of the integration score how their experience with

various integrations went and if everything met their expectations. This data will be analyzed to ensure it matches what researchers expect from an application that receives a score.

Any revisions to the scores will come as this additional data is compiled in the coming months. The team also plans to offer guidance to application developers on how they can improve their scores to make integrations more developer-friendly and useful for everyone.

The results, which can be searched by category or by vendor, are now available at <https://ezragroupllc.com/wealthtech-integration-scores/>.

## **ABOUT EZRA GROUP, LLC**

Ezra Group, LLC provides technology and business research, information, and advice to banks, broker-dealers, asset managers, private equity and fintech firms. Anchored by a 17-year track record, clients look to them for specialized industry expertise to optimize their platforms, processes, and products and super-charge business growth. Under the leadership of founder and CEO Craig Iskowitz, Ezra Group delivers deep knowledge and decades of combined team experience in wealth management technology and services. Ezra Group publishes original blogs, articles, podcasts, and newsletters that inform and educate enterprise wealth management firms, financial services organizations, technology vendors, and financial advisor audiences. To learn more about how they help clients transform, visit [EzraGroupLLC.com](https://EzraGroupLLC.com).

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