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Annual Awards Announced at T3 Technology Conference for Financial Professionals

William “Bill” Bengen wins the Lifetime Achievement Award, while Syntax Data and Nitrogen win AI Innovation Awards

NEW ORLEANS, LA (March 10, 2026) – The 22nd annual [T3 Technology Conference](#) (Technology Tools for Today, a.k.a. “T3”), the premier event for technology and innovation for the financial planning, investment and wealth management professions, today announced the winners of its 2026 awards in a mid-day presentation at the T3 event happening in New Orleans, recognizing excellence in leadership, technology, and emerging innovation.

With a premier lineup of workshops, presentations, and sessions, including T3’s all-new [AI University](#), advisors will confidently leave this year’s conference not only equipped with new skills, but also having the direction and clarity to implement them. These awards distinguish those who are already flourishing in this always-evolving technological landscape.

“The professionals we are honoring this year represent the best qualities of our industry,” said [Joel Bruckenstein](#), President of T3. “Their dedication to continuous improvement, innovation, and long-term growth has strengthened the advisory ecosystem and helped shape its future. Achievements like these are the result of sustained effort and a deep commitment to advancing the profession.”

LIFETIME ACHIEVEMENT AWARD – WILLIAM “BILL” BENGEN, BEST SELLING AUTHOR OF *A RICHER RETIREMENT* AND CREATOR OF THE BENGEN RULE

Pictured: William Bengen, Best Selling Author of *A Richer Retirement* and creator of the Bengen Rule

A former aerospace engineer who later became a financial advisor and principal of his own advisory firm, [William “Bill” Bengen](#) conducted groundbreaking research in the 1990s that fundamentally reshaped how advisors approach retirement distribution strategies. He is widely recognized as a

pioneer in retirement income planning and the creator of the foundational “4% rule,” often referred to as the Bengen Rule.



His analysis of historical market data demonstrated that retirees could withdraw approximately 4% of their portfolio in the first year of retirement, adjusting annually for inflation, with a high probability that their assets would last 30 years. This research provided the first rigorous, data-driven framework for sustainable withdrawal rates and remains deeply embedded in modern retirement planning methodologies and advisor technology platforms.

“Almost all of the retirement distribution planning conducted in advisory firms today, as well as the software that enables it, is rooted in his research,” said Bruckenstein. “Before Bill Bengen came along, nobody could actually tell you whether or not as a retiree, your money was going to last 25 or 30 years. The research was just never done. Everything was guesstimates.

Bengen is also the author of [*A Richer Retirement: Supercharging the 4% Rule to Spend More and Enjoy More*](#), in which he expands on his original research and offers updated strategies for optimizing retirement income.

AI INNOVATION AWARD – SYNTAX DATA’S “SAIDEE”

Pictured: [Patrick Shaddow](#), CEO, Syntax Data



[Syntax Data](#)’s Saidee™ is Syntax’s new, premier AI agent and portfolio development application. Designed to empower financial advisors, Saidee enables the seamless creation, ongoing management, and marketing support of customized, rules-based portfolios and indices. Saidee allows advisors to automate the process of designing client specific, market driven, or custom rules-based portfolios, while also providing easy-to-understand client-facing commentary and ideas. The application is now fully available to the RIA community via [Syntax Direct](#), Syntax’s custom index creation platform.

“A lot of folks are building AI capabilities into their software, but the way Saidee works is unique,” explains Bruckenstein. “Saidee basically automates the data entry and custom index creation for you – but it’s not a black box. You can actually look at what the inputs you gave verbally and then align them with how the software is executing them, so everything is transparent, and everything is auditable. To me, that’s the way AI should work in advisor-facing software.”

Syntax Data is a financial data and technology company that empowers investment managers, wealth advisors, and financial institutions with precise, transparent data solutions that optimize index development, portfolio customization, and investment analysis to drive better investment outcomes.

By organizing securities based on fundamental attributes and economic characteristics, Syntax helps investment professionals gain clearer insights into risk, diversification, and strategy construction. Today, the company provides data, analytics, and technology solutions to wealth managers, asset managers, and fintech platforms seeking more precise portfolio intelligence.

[Syntax Direct](#) is a breakthrough custom direct indexing platform by Syntax Data that enables financial advisors to create personalized, rules-based portfolios and manage index files in real-time. It won the prestigious [2024 Emerging Technology of the Year](#) award from T3 at the January 2024 conference in Las Vegas.

AI INNOVATION AWARD – NITROGEN’S “NUCLEUS”

Pictured: Dan Zitting, CEO, Nitrogen



[Nitrogen’s Nucleus](#) AI Engine is an embedded artificial intelligence capability within the Nitrogen risk and proposal platform designed to enhance advisor efficiency and client engagement. Launched February 19, 2026, Nucleus helps advisors quickly generate client-ready insights, portfolio commentary, and proposal enhancements directly within their workflow. By integrating AI into core planning and risk analysis functions, the tool streamlines preparation time while supporting more personalized, data-driven conversations. The result is a more scalable and responsive approach to delivering advice.

“Nucleus is really cutting edge,” Bruckenstein explains. “It’s not only surfacing things for advisors, it’s actually doing things for advisors. And I like where they are on proposal generation. They really have almost straight-through processing, particularly for insurance-broker-type situations involving annuities. They’re making a lot of progress, and they need to be recognized for it.”

Nitrogen is a leading risk-centric wealth management platform founded in 2011 by Aaron Klein, Matt Gunning, and the team behind the original Riskalyze technology. The firm was established to transform how advisors quantify, communicate, and align investment risk with client goals, replacing subjective conversations with data-driven clarity.

Over time, and now under executive direction from [Dan Zitting](#), CEO, who took over in December 2023 from co-founder Aaron Klein, Nitrogen has evolved into a comprehensive growth platform that integrates risk assessment, proposal generation, client engagement, and analytics. Today, the company serves thousands of advisory firms seeking to deliver more consistent, transparent, and scalable advice experiences.

Zitting is a Software-as-a-Service (SaaS) veteran, formerly CEO of Galvanize and chief product/strategy officer at Diligent. He and his team are focused on growing Nitrogen's platform and enhancing advisor-client engagement tools.

ABOUT T3 TECHNOLOGY TOOLS FOR TODAY

T3 was founded in 2003 by financial services experts (and former financial advisors) David Drucker and Joel Bruckenstein. Together, they are the authors of three books on applied practice management and technology for financial advisors. In the early years, they produced the T3 Technology newsletter, a first-of-its-kind publication in the financial services industry. From the newsletter, [T3TechnologyHub.com](https://www.t3technology.com), an online info-portal for financial services firms and financial advisors, was born. 22 years ago (in 2004), the duo began hosting what has now become the wealth management industry's leading event focused on advisor technology, innovation, and practical implementation. T3 brings together financial advisors, wealth management executives, fintech leaders, and technology decision-makers to explore how technology is shaping the future of advice.

Taking place March 9–12, 2026, in New Orleans, the 2026 T3 Conference theme is: “From Noise to Knowledge: The FinTech Playbook for 2026 and Beyond.” This theme reflects T3’s long-standing mission to help advisors cut through an increasingly crowded fintech landscape. With four days of immersive programming – including the new [AI University](#), a robust exhibit hall, and peer-driven learning – T3 utilizes hands-on demos, real-world use cases, and direct access to fintech innovators to deliver actionable insights designed to help advisory firms make smarter technology decisions today and build stronger practices for the future. It is the biggest, longest-running, and most respected conference of its kind.

“The T3 conference for me is a special place. It is the only conference that I will never miss,” said [Craig Iskowitz](#) of Ezra Group, one of the industry's top wealthtech consulting firms.

“T3 as a must-attend venue where CTOs and advisors can meet directly with wealthtech C-suites, influence product roadmaps, evaluate new tools efficiently, and take advantage of ‘bring someone with you’ incentives like BOGO registrations to maximize learning and strategy alignment,” said [Marie Swift](#) of Impact Communications, head of PR and marketing communications for T3.

“If you’re not familiar with T3, well, it’s the tech expo for the financial planning/financial services profession. All the tech solutions you know about, and all of the new ones you haven’t seen yet, are there in the exhibit hall, and the sessions are opportunities to see new features of existing solutions, or new solutions altogether, demo-ed and explained,” said [Bob Veres](#), co-producer of the T3 / Inside Information survey and publisher of Inside Information.

“We’ve all seen a million sessions that talk about the promise of AI. That’s why T3 is bringing AI University to the T3 conference this year. AI University is about what specifically is available, what’s going to be available, and hands-on learning about AI. Every session at AIU is going to be teaching you how to do something with AI, actually touching it, and understanding the different roles it can play in your practice,” Bruckenstein said.

The conference continues to be a leading forum for financial professionals and technology providers to collaborate, learn, and shape the future of wealth management. For more information on the T3 Conference, visit www.T3Conferences.com.

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