

# NEWS



**SCRATCHWORKS**

FOR IMMEDIATE RELEASE

**Media contact:**

Marie Swift  
Impact Communications, Inc.  
[MarieSwift@ImpactCommunications.org](mailto:MarieSwift@ImpactCommunications.org)  
800-974-7753 Office

**Live and In-Person!**

**Denton, Texas**

**September 27 - October 1, 2021**

## **T3 and ScratchWorks Team Up for One Big Week in Texas**

*Agenda includes full week of practice management sessions and technology demos for financial advisors and financial services executives*

**Fintech startups will compete in front of industry all-stars panel of judges “Shark Tank style”**

May 4, 2021 [DALLAS, TX] -- Joel Bruckenstein, president of Technology Tools for Today (T3), has launched registration for the T3 Advisor and T3 Enterprise conferences. Formerly run as two separate events at different venues at different times of the year, the post-pandemic plan for 2021 is to run the two events back-to-back beginning Monday September 27 and concluding on Friday, October 1, 2021, in Denton, Texas.

**New this year:** ScratchWorks, a FinTech accelerator that connects tech startups with wealth management leaders to advance the digital transformation of the financial services industry, will be hosting their “Season 4” competition as a special event in conjunction with T3. All of this will take place in one location – the Denton Convention Center just north of Dallas.

**All who attend the T3 Advisor or the T3 Enterprise conference will be provided free admission to the ScratchWorks competition.**

“ScratchWorks is currently accepting applications from FinTech companies seeking seed funding or early stage investments – and we’re extending the submission window through June 15<sup>th</sup>,” said Kevin Corbett, a spokesperson for ScratchWorks. “This is the first, and longest running FinTech accelerator of its kind in the wealth management industry, and the audience is in for a real treat.”

Three finalists will take the stage to pitch their respective companies to the ScratchWorks all-star panel of Season 4 Investors – which will include Ron Carson, Marty Bicknell, and Shannon Eusey – during a live session at the T3 venue. Finalists have the opportunity to receive funding offers on the spot, in addition to receiving tremendous exposure to top individuals and organizations in the financial services industry. Previously, only guests attending the Barron’s Top Independent Advisors Summit were able to witness this live, interactive event.

ScratchWorks is sponsored this year by [Fidelity Clearing & Custody Solutions](#), the [University of Colorado \(CU\) Leeds School of Business](#), and [T3](#).

“The most exciting part of ScratchWorks is that it provides an opportunity for FinTech innovators to pitch to investors during a live event attended by hundreds of leaders from across the wealth management industry,” said T3’s Joel Bruckenstein. “We are excited to be hosting the ScratchWorks competition at T3 this year. This is about accelerating technologies that will move our industry forward.”

**COME ONE, COME ALL: THE 18<sup>TH</sup> ANNUAL T3 EVENT IS HAPPENING IN TEXAS THIS FALL**

“We are planning for this to be our biggest and best year yet,” Bruckenstein continued. “It’ll be a big week full of interesting announcements, sessions and camaraderie. Financial services executives who support financial advisors and financial advisors who work directly with clients are invited to join us. T3 conferences cover everything you need to know about technology and how it can be used as a lever for your firm. Our theme this year is ‘Connect, Integrate and Transcend at T3’ – something we are excited to do in person as health concerns lift and we can return to a more normal business cadence.”

“Overall, T3 remains a destination spot on the advisor conference circuit,” said long-time attendee Johnny Sandquist of Three Crowns Copywriting & Marketing in his [review of the 2020 T3 Advisor conference](#). “If you want the chance to get extended, one-on-one conversations with technology companies, their developers and executives, there’s not another event that provides quite the same experience.”

In a soon-to-be-released industry survey, the T3 Conference ranks “#1 in Technology Implementation Ideas” based upon responses from practicing advisors. The conference also scored among the highest in overall satisfaction by past attendees.

Craig Iskowitz, CEO and found of Ezra Group, a financial technology consulting firm, [summarized the 2020 T3 Advisor Conference, where 793 people participated in the largest gathering of its kind](#), in this guest blog post for Michael Kitces' *Nerd's Eye View*.

According to Kitces in his 2020 list of [Best Conferences for Financial Advisors to Choose from in 2020](#), the Technology Tools for Today (T3) conference is the largest of its kind. It is an event solely focused on technology solutions specifically for financial advisors and wealth management firms that predates, by more than 10 years, the rise of the now-popular “FinTech” and “WealthTech” categories. “Functionally, though, the T3 conference operates less as a ‘conference’ and more as a ‘trade show’ – an exhibition-style event where advisor technology companies come to demo their latest wares and new or coming features. As a result, while there is an agenda of conference sessions, many are simply designed to allow companies to showcase their software... which isn’t seen as ‘selling out’ the session to a sponsor, but the whole *point* of the trade-show-style session in the first place,” Kitces said.

“We couldn’t be happier to be bringing the financial services and financial advisory worlds one big live and in-person event with two tracks, one for enterprises and one for advisors – with everything under one roof. Everyone gets a suite (if they book early enough and can get in at the Embassy Suites hotel venue) – and a party (or two), too,” said Bruckenstein.

## **ABOUT SCRATCHWORKS**

ScratchWorks is a financial technology accelerator that connects innovative technology companies with investment and wealth management luminaries to advance the digital transformation of the financial services industry. ScratchWorks invites early stage financial technology companies to make their pitch to five investors, representing five different wealth management and investment firms that collectively manage more than \$60 billion in assets. Learn more at [www.Scratch.Works](http://www.Scratch.Works) or email Kevin Corbett at [Kevin@Scratch.Works](mailto:Kevin@Scratch.Works).

## **ABOUT TECHNOLOGY TOOLS FOR TODAY (T3)**

Now in its eighteenth year, the **T3 conference for financial advisors (“T3 Advisor”)** is the largest of its kind; it is an event solely focused on technology solutions specifically for financial advisors and wealth management firms. In the early years, Joel Bruckenstein, CFP®, and his then-partner David Drucker, CFP® (since retired), saw the need to bring the industry’s leading pioneers and financial advisors and the technology creators together, once a year in person. The goal was to advance the adoption of technology, educate advisors, and to create the best outcomes for investment advisory companies and the financial planning profession.

As advisor tech-adoption grew, the **T3 Enterprise conference (“T3 Enterprise”)** was established to help financial services executives uncover new solutions for their firms (banks, broker/dealers, custodians, RIA networks, insurance agencies, etc.), as they seek to secure and improve their value proposition to the financial advisors they serve.

The **T3 Technology Hub, a digital repository of technology announcements and commentary**, became a reality somewhere along the way, replacing the old T3 newsletter which at the time that Bruckenstein and Drucker were producing it was filled with cutting edge information and emailed to subscribers as a PDF. One of the early Bruckenstein/Drucker books (and many of the early T3 conferences) focused on creating a paperless office via scanning and digital storage on the advisor’s own computers. That was then. This is now. My how far we’ve come. Terms like cloud native, portal, workflow and CRM, digital advisor, and tech stack are now a part of our vernacular. To learn more about the upcoming T3 events and secure your seat, visit **[www.T3Conferences.com](http://www.T3Conferences.com)**.

###