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Advicent is the leading provider of SaaS technology solutions for the financial services industry. Our products include financial planning, goals assessment and marketing communications tools. Thousands of financial professionals, including dozens of the world's largest financial institutions, use Advicent's solutions to help build their foundation for success.

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Save 20%

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Advizr is the next generation in financial planning software. Advizr has automated advice delivery, empowering more advisers to participate in holistic advice and allowing more clients to receive financial plans regardless of their net worth. Its intuitive, powerful and sleek interface enables advisers to create and deliver plans in minutes.

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asset-map[®]

Asset-Map is a client communication tool that was created by financial professionals for financial professionals. The platform creates interactive visuals blending design thinking and personal finance to deepen client conversation.

Discount to FPA Members:
30-day free trial and \$10/mo savings (no annual contract)

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Redi2 Technologies, Inc. is a market-leading billing and revenue management solution provider. Redi2's solutions process fees for more than 550 financial firms around the globe including automated fee billing for institutional asset managers, investment sponsors, independent broker dealers, private wealth managers, RIAs, TAMPs and other third-party service providers.

BILLFIN powered by Redi2 is the first cloud-based billing solution for RIAs.

Discount to FPA Members:
One month free on annual subscription

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Black Diamond[®]

WEALTH PLATFORM

The Black Diamond[®] Wealth Platform is one of SS&C Advent's leading investment and financial technology solutions delivering wealth management capabilities to more than 1,000 financial institutions, including advisers, wealth managers, IBDs, RBDs, and aggregators.

By providing a purposeful suite of tools, this cloud-based platform allows advisers to manage their client's complete wealth picture through portfolio management, reporting, and rebalancing solutions which are combined with fully outsourced daily reconciliation and data management services.

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15% off basis point fees

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Bloomberg Tax

Bloomberg Tax offers expert software products for tax, accounting, and financial professionals. With category-leading software and top-rated technical support, we are the solution of choice for professional firms and corporations of every size. More than 70,000 customers, including the IRS, depend upon Bloomberg BNA's software products for the highest degree of tax, regulatory, and compliance expertise available in the market.

Discount to FPA Members:
Save 20% on professional tax planning
software

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Clearnomics empowers financial advisers to have engaging market conversations with their clients. In just a few clicks, our technology allows advisers to craft insightful market and economic presentations that build trust. With Clearnomics, spend less time managing data, spreadsheets and slides, and more time engaging clients and building your business.

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\$10/mo off Clearnomics Advisor plan

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College for Financial Planning®

EDUCATING THE NATION'S TOP FINANCIAL ADVISORSSM

*Founded in 1972, **The College for Financial Planning** created the prestigious CFP® certification and has educated over 160,000 financial professionals. Our successful alumni have increased both their earnings and their number of clients and client referrals. We can help advance your career as a financial adviser by guiding you to the program best suited to your practice.*

Discount to FPA Members:

Save 15% on professional education
programs/courses

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Everplans is a secure, digital archive of everything your clients' loved ones will need should something happen to them. It contains:

- Wills, Trusts, and insurance policies
- Important accounts and passwords
- Info about your home: bills, vendors, etc.
- Health and medical information
- Advance Directives and DNRs
- Final wishes and funeral preferences
- And much more...

Everplans Professional: a co-branded life planning tool for you and your clients.

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Save 10% on Everplans Professional

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FP TRANSITIONS®

FP Transitions specializes in the valuation and analysis of the intangibles that make a financial services practice unique, and valuable. FP Transitions' consultants guide owners and advisers in planning for the inevitable end of their careers, turning this into a positive event. We employ strategies and thinking that build upon a lifetime of work and trusting client relationships to develop unique succession plans that are designed to simultaneously realize value for the founder and perpetuate business growth for the next generation of advisers.

Discount to FPA Members:
\$200 off Comprehensive Valuation Report
or 1 month of the Equity Management
system waived

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IncomeConductor is a comprehensive retirement income platform for advisers that allows them to easily and efficiently create, implement, track, and manage their clients' income plans through a time-segmented approach to income planning. We provide training, sales and marketing support, and case consultation to help our users become successful retirement income specialists.

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Save 10%, with a free 30-day trial

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Financial Education

*The **Kaplan Financial Education** you see today is a product of continued evolution and passion for student education and success in the financial industry. Our enterprise solutions lead the industry with the most study tools, delivery methods, and reporting available from any single provider, including self-study, live classroom, and online options. Our faculty and instructors are not just experienced academics...they're practitioners who know what it takes to pass the exams and succeed in the real world.*

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For over 25 years, [Markel](#) has established a strong reputation as a result of its industry expertise, stable premiums, and excellent claims management services. Specializing in policy customization and risk mitigation strategies. New optional coverage for cyber liability available.

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5% off E&O

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MoneyGuidePro® makes robust goal-based financial planning fast and easy. We believe that everyone needs and deserves a quality financial plan because it makes lives better. It helps clients make better decisions with better advice and you more successful. Reach more clients profitably with quality financial planning that addresses key financial concerns. Help identify gaps and empower clients to stress test their plans while focusing on achieving their goals for retirement. MoneyGuidePro® is easy-to-use and adaptable and can help you grow your revenue, engage clients faster and do more with your time.

Discount to FPA Members:
\$300 off annual price

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Nest Egg Guru is 100% client-facing software that is intended to attract, engage, and educate both existing clients and new site visitors. Its CTA invites users to test their college and retirement planning preparedness while the app itself features intuitive design paired with a sophisticated simulation engine and unique functionality that sets Nest Egg Guru apart from traditional Monte Carlo software.

Discount to FPA Members:
\$300 off first year subscription price

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Orion Advisor Services is a leading portfolio accounting and performance reporting tool in the marketplace. Orion allows advisers to provide customized performance reports with a detailed portfolio analysis, supports trade order management, facilitates AUM billing for their clients, and integrates deeply with a wide range of related advisory technology tools.

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Save on per account fees

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work **smarter** where you want

Redtail Technology, Inc. is the leader in Web-Based Client Relationship Management solutions for the financial adviser. Redtail is bringing next-generation technology to the financial adviser to help them better manage their client base so that they can have MORE TIME, earn MORE MONEY and have MORE FUN!

Discount to FPA Members:
Save \$9/month

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RightCapital

RightCapital provides a revolutionary financial planning tool that digitizes and redefines the financial planning experience. Using cutting edge technology, they significantly cut down time and cost of creating a plan and improve user experience. Designed to promote interaction and collaborations between advisers and clients, RightCapital provides a simple and powerful financial planning tool and a Personal Finance Management (PFM) portal to create financial plans real time.

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Save 10%

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RYAN INSURANCE

STRATEGY CONSULTANTS

"Protecting Your Financial Plans Since 1978"

*Since 2009 FPA has partnered with **Ryan Insurance Strategy Consultants** to offer FPA members an industry-leading Long Term Disability plan, a group voluntary Term Life plan, and a recently launched Vision and Dental plan.*

Additionally, since 1978, Ryan Insurance Strategy Consultants has worked with Fee-Only planners nationwide with every aspect of life, disability and long-term care insurance planning for their clients.

Offer to FPA Members:

Guaranteed acceptance on LTD for new FPA members that enroll within 60 days of joining FPA

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Tolerisk is the fiduciary caliber risk tolerance assessment technology for advisers. Our patent-pending 2-dimensional assessment lets advisers easily analyze their client's willingness to accept risk using a traditional psychometric profile and their ability to take risk, by analyzing their cash-flow chronology. Our deep analytics are simple to display and convey. Tolerisk will impress your clients, prospects, and your compliance officer!

Discount to FPA Members:
Save 10% on any subscription

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TrueProfile

TrueProfile LTD is the creator of TrueProfile, the only client intelligence platform that is based on rigorous academic research with a focus on revealed preferences, rather than stated preferences. The TrueProfile Risk Essentials product reveals clients' true risk tolerance, loss aversion and decision consistency as defined by economic science — providing statistical confidence for every client result.

Discount to FPA Members:
\$79/month during your first year

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twenty over ten

Twenty Over Ten: Websites designed to set you apart. Highlight your brand's remarkability with a tailored, mobile responsive website designed to generate action. Using our intuitive platform, independent financial advisors can now create and manage compliant websites easily and efficiently.

Discount to FPA Members:
\$59/month (paid annually) or \$75/ month
(paid monthly) *plus* \$100 off bundles

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Plan • Prepare • Peace of Mind

created by Advisors, Estate Planning Attorneys,
Certified Financial Planners and Insurance Professionals

***Yourefolio:** The Yourefolio platform brings the understanding of estate and legacy planning all together. We go beyond by providing a system of organization, information, analysis, presentation and clarity. To learn more about our offering please visit yourefolio.com.*

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