

Contents

Introduction	1
David Drucker	
CHAPTER 1	
Selecting the Right CRM System	5
Davis D. Janowski	
CHAPTER 2	
The Future of Financial Planning Software	17
Robert D. Curtis	
CHAPTER 3	
The Future of Financial Planning Software and the New Client-Advisor Relationship	27
Linda Strachan, Kory Wells	
CHAPTER 4	
Portfolio Management Software	37
Mike Kelly	
CHAPTER 5	
Achieving Growth and Profitability with Technology Integration	47
Jon Patullo	
CHAPTER 6	
How the World Wide Web Impacts the Financial Advisor	61
Bart Wisniowski, Jason Lindstrom	
CHAPTER 7	
Managing Your Online Presence	73
Marie Swift	
CHAPTER 8	
Client Portals and Collaboration	93
Bill Winterberg	

CHAPTER 9	
The Cloud	107
J. D. Bruce	
CHAPTER 10	
Digital Signature Technology	129
Dan Skiles	
CHAPTER 11	
Innovative Software and Technologies Implemented at One of the United States' Leading Advisory Firms	139
Louis P. Stanasolovich, Christopher J. Kail, Sherri M. Slafka, Daniel D. Kleck	
CHAPTER 12	
Virtual Staff Sparks Growth, Profitability, and Scalability	159
Jennifer Goldman	
CHAPTER 13	
ROI—The Holy Grail of the Technology Purchase Decision	173
Timothy D. Welsh	
CHAPTER 14	
Building an Efficient Workflow Management System	187
David L. Lawrence	
EPILOGUE	
Advisor Technology: Yesterday, Today, and Tomorrow	197
Joel P. Bruckenstein	
About the Authors	205
About the Contributors	207
Index	219