



Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours

David J. Drucker, Joel P. Bruckenstein

Download now

[Click here](#) if your download doesn't start automatically

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours

David J. Drucker, Joel P. Bruckenstein

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours David J. Drucker, Joel P. Bruckenstein

Revolutionize your financial advisory practice with the latest cutting-edge tools

Tired of spending more time with filing cabinets than with clients? Is overhead eating up your margins? In a new revised edition of the "bible" of practice management and technology for financial professionals, two leading financial planners, with some help from their friends*, deliver the knowledge advisors have been begging for. This book serves up a nontechnical trove of technology, clever workarounds, and procedural efficiencies tailored to help financial advisors in private practice move toward today's virtual office. The authors show you how to drastically reduce the paperwork in your office, slash overhead, and find anything you need in seconds using the latest software.

This revised edition includes new information on SaaS and cloud computing, software integrations, mobile devices/apps, social media tools, portfolio accounting and outsourcing, collaborative tools, digital signatures, workflow management, marketing technology and much more.

- Perfect for successful practices seeking greater efficiencies and healthier profit margins
- The authors are well-known financial advisors, each with more than 30 years of experience in financial services
- Addresses the evolution of the virtual office and its impact on advisory firms

If you're looking for new systems and efficiencies to transform and streamline your private practice, look no further than *Technology Tools for Today's High-Margin Practice*.

*Chapter 1 Selecting the Right CRM System, Davis D. Janowski

Chapter 2 The Future of Financial Planning Software, Bob Curtis

Chapter 3 The Future of Financial Planning Software and the New Client-Advisor Relationship, Linda Strachan

Chapter 4 Portfolio Management Software, Mike Kelly

Chapter 5 Achieving Growth and Profitability with Technology Integration, Jon Patullo

Chapter 6 How the World Wide Web Impacts the Financial Advisor, Bart Wisniowski

Chapter 7 Managing Your Online Presence, Marie Swift

Chapter 8 Client Portals and Collaboration, Bill Winterberg

Chapter 9 The Cloud, J. D. Bruce

Chapter 10 Digital Signature Technology, Dan Skiles

Chapter 11 Innovative Software and Technologies Implemented at One of the United States' Leading Advisory Firms, Louis P. Stanasolovich

Chapter 12 Virtual Staff Sparks Growth, Profitability, and Scalability, Jennifer Goldman

Chapter 13 ROI—The Holy Grail of the Technology Purchase Decision, Timothy D. Welsh

Chapter 14 Building an Efficient Workflow Management System, David L. Lawrence

 [Download Technology Tools for Today's High-Margin Practice: ...pdf](#)

 [Read Online Technology Tools for Today's High-Margin Practic ...pdf](#)

Download and Read Free Online Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours David J. Drucker, Joel P. Bruckenstein

From reader reviews:

Shawn Francis:

Have you spare time to get a day? What do you do when you have far more or little spare time? That's why, you can choose the suitable activity with regard to spend your time. Any person spent their very own spare time to take a move, shopping, or went to the actual Mall. How about open or maybe read a book entitled Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours? Maybe it is being best activity for you. You recognize beside you can spend your time using your favorite's book, you can better than before. Do you agree with the opinion or you have other opinion?

Mark Carlton:

People live in this new time of lifestyle always aim to and must have the spare time or they will get wide range of stress from both everyday life and work. So , once we ask do people have time, we will say absolutely yes. People is human not a robot. Then we consult again, what kind of activity do you have when the spare time coming to a person of course your answer will certainly unlimited right. Then ever try this one, reading publications. It can be your alternative within spending your spare time, the actual book you have read will be Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours.

Roger Thomas:

That reserve can make you to feel relax. This particular book Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours was bright colored and of course has pictures on the website. As we know that book Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours has many kinds or style. Start from kids until adolescents. For example Naruto or Private eye Conan you can read and feel that you are the character on there. Therefore not at all of book usually are make you bored, any it makes you feel happy, fun and unwind. Try to choose the best book for yourself and try to like reading which.

Teresa Spillman:

What is your hobby? Have you heard this question when you got pupils? We believe that that concern was given by teacher on their students. Many kinds of hobby, All people has different hobby. Therefore you know that little person including reading or as reading become their hobby. You should know that reading is very important along with book as to be the factor. Book is important thing to incorporate you knowledge, except your own personal teacher or lecturer. You will find good news or update with regards to something by book. Numerous books that can you choose to adopt be your object. One of them is Technology Tools for

Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours.

Download and Read Online Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours David J. Drucker, Joel P. Bruckenstein #68OM5FBU2QH

Read Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein for online ebook

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein Free PDF download, audio books, books to read, good books to read, cheap books, good books, online books, books online, book reviews epub, read books online, books to read online, online library, greatbooks to read, PDF best books to read, top books to read Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein books to read online.

Online Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein ebook PDF download

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein Doc

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein Mobipocket

Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours by David J. Drucker, Joel P. Bruckenstein EPub