

NEWS



For Immediate Release

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T3 2012 Conference Recap

- *Seven-Year Milestone*
- *Record High Attendance Figures*
- *Venue for Strategic Partnership and Major Industry Announcements*
- *Financial Planning Student Involvement*
- *Plans for 2013*

Dallas – March 23, 2012 – Joel Bruckenstein and David Drucker, producers of the “T3” Technology Tools for Today™ Conference (T3), announced final attendance figures for the seventh annual conference today. The conference, held this year from February 16 – 18 at Dallas’ Hilton Anatole Hotel, attracted 575 attendees, an all-time record high attendance for the seven year-old conference. The increased attendance figure demonstrates that T3 continues to be the place where business professionals in the financial services industry come to interact with technology producers. “The T3 Conference has developed a reputation for being the place where people come to not only learn about new technology, but also shape future technological developments by speaking directly to developers and expressing technological needs,” said Dave Drucker.

EXHIBIT HALL A MAJOR DRAW

The 70-plus sponsors in the exhibit hall were constantly talking with one another and some advisors attending, such as Louis P. Stanasolovich, CFP®, of Legend Financial, spent their entire time in the exhibit hall learning about the latest and greatest technology solutions on display. “Sure the sessions looked great,” Stanasolovich said. “But I have decided to use my time in the exhibit hall instead. There are just so many great solutions here and I doubt I’ll be able to make it

to all the booths and see all the demos I want to by the time the hall closes tomorrow,” said Stanasolovich.

CUTTING-EDGE SESSIONS

“There were many exceptional sessions at this year’s conference,” said Joel Bruckenstein. “From the session led by Jon Patullo from TD Ameritrade about selecting the right technologies for your practice to Tamarac’s Cameron Sheehan and his session debunking the myths associated with integration. There was truly something for everyone to learn, no matter where they were on the tech-savvy continuum, at this year’s conference. Black Diamond hosted an advisor panel which discussed, among other things, the challenges of changing providers as well as the benefits if it is done correctly. Tim Welsh of Nexus Strategy and Dan Skiles of Shareholders Service Group discussed how firms can streamline their workflows and leverage new technologies,” said Bruckenstein.

VENUE FOR MAJOR ANNOUNCEMENTS

Both Bruckenstein and Drucker are quick to point out that T3 is more than just a place for informative sessions. The conference has also developed a reputation as a place to create strategic partnerships and integrations. During this year’s conference, several significant announcements were made. As the opening bell rang at this year’s conference, Envestnet, a leading provider of integrated wealth management solutions for financial advisors, announced its acquisition of Tamarac, Inc., a provider of sophisticated portfolio management technology that enables Registered Investment Advisors (RIAs) to efficiently deliver customized individual account management to their clients. In addition, Trustfort and Asset Book announced a strategic partnership and Cornerstone Revolutions, makers of PowerInvestmentTools for Advisors, announced an exclusive strategic partnership with MacroRisk Analytics.

FINANCIAL PLANNING STUDENT INVOLVEMENT

Technology innovators MoneyGuidePro and Redtail Technology provided free conference passes for 25 students from Texas Tech University and the University of Texas at Dallas to attend the T3 conference. Students attended educational sessions, networked with industry veterans, and visited the exhibit hall to review products and services provided by the technology companies supporting the event.

SPONSOR COMMENTS

“This was StatPro's first year at T3 and it proved to be a very valuable experience helping us launch StatPro Revolution to the investment advisor community. We believe great cloud technology can really empower investment managers of any size and help them add value quickly. The T3 conference was the perfect forum for this message,” said Rachael Cooper, Global Marketing Manager at StatPro.

Peter S. Velardi, CFP®, President and COO of FiPath, Inc. said: “As a fast growing start up, T3 provided a terrific opportunity for us to get our word out, hear valuable feedback from top

advisors and connect with potential partners. More than anything, we came away with confirmation that advisors are looking for automated online solutions to acquire more clients and serve clients better. That really is what T3 is all about — leveraging technology! Great fit for us as a total online marketing solution.”

2013 PLANS

Additional content from the conference, including video interviews, a conference highlights clip, and presentation slides, can be found at <http://www.TechnologyToolsForToday.com>.

Organizers are finalizing details for the eighth annual conference, which will be held in February 2013 — location to be announced.

About T3 Technology Tools for Today Conference

Since its inception in 2006, the annual Technology Tools for Today Conference (T3) has been the only annual conference devoted exclusively to the technology and practice management needs of independent financial advisors. Co-chaired by the experienced team of Joel Bruckenstein and David Drucker, the T3 conference brings together the nation’s leading technologists, advisors, consultants and technology vendors to discuss technology developments that impact financial advisors.

For conference information, visit www.TechnologyToolsForToday.com. Get breaking news by following @t3fan @daviddrucker @fintechie and @marieswift on www.Twitter.com.