

NEWS

For Immediate Release



CONTACT:

Teresa Law

Impact Communications, Inc.

Phone: 913-649-5009

Email: teresalaw@impactcommunications.org

T3 Technology Conference for Financial Advisors Celebrates Tenth Anniversary

Technology Solutions Providers to Reveal Latest and Greatest Innovations at “Granddaddy” Financial Industry Event

Dallas [December 16, 2014] – Financial industry leaders Joel Bruckenstein and David Drucker are encouraging financial advisors nationwide to attend the tenth annual T3 Technology Conference for financial advisory firms of all sizes. The conference, which is being held at the Hilton Anatole in Dallas, February 12-14, 2015, is designed to bring together independent financial advisors and company decision-makers with the creators of the industry’s most innovative technology solutions.

Interested parties can visit <http://www.technologytoolsfortoday.com/conferences> to view the agenda and register for the event. Journalists may contact teresalaw@impactcommunications.org to request a press pass. FPA and NAPFA members, who will receive preferred pricing based on preconference negotiations with T3, should visit their chapter websites and/or be alert for discount codes that are available on the T3 website registration page.

GRANDDADDY EVENT

“We are excited to be hosting our tenth annual T3 Advisor Conference,” said conference co-chair David Drucker, CFP®. “It’s been quite a journey. At the conference, Joel and I will be looking back over the past ten years and reminding attendees of how far we’ve come as an industry. Ten years ago outsourcing to virtual work partners and going paperless were the main topics of discussion. Eight years ago moving to the cloud was a big topic of debate and we were dialoging about virtual realities and Web 2.0. Five years ago technology integrations sprang to life and continue to be a big factor in how workflows get created and adopted. While some of those themes are still evident and important, the conversation now includes crash testing portfolios, big data and cybersecurity. We’ve even had virtual human beings and avatars show up at our conferences in the recent past,” Drucker said with a laugh.

“We started doing these tech conferences before the industry even knew they needed them,” added co-host Joel Bruckenstein, CFP®. “The speakers and sponsors participating provide cutting edge software, services and SaaS solutions to RIAs and hybrid advisors. The end result is that the financial advisory firms who send their principals and staff to the T3 conferences are more efficient and compliant, while at the same time being more effective at servicing their end clients. We’ve been doing this for ten years now and have a really good formula for delivering value to everyone who is a part of the ecosystem,” Bruckenstein said.

“This really is the ‘granddaddy’ of all technology-related events in the financial planning and investment advisory world,” said Michael Kitces, publisher of Nerd’s Eye View, a well-respected industry knowledge portal. “As someone who will speak at almost 70 conferences this year, I’ve participated in nearly every major conference available for financial planners. As the pressure continues to grow on advisors to step up on the technology front, the T3 conference is without a doubt ‘the place to be’ for advisors who want to see the latest developments from software companies that serve them. And, because it is ‘the place to be seen’ for advisor tech, the T3 conference always includes a number of big debuts from new software providers as well. This is why I named the T3 conference ‘the best conference for advisor technology’ – I can’t wait to see what’s announced this year. (You can read more and get a special discount code at <http://www.kitces.com/blog/the-8-best-conferences-for-financial-advisors-in-2015>),” Kitces said.

“The T3 Advisor Conference provides an ideal opportunity for financial advisors and decision-makers within the investment advisory and financial planning community to meet with technology solutions providers in a unique setting,” said long-time attendee and brand ambassador Marie Swift. “Many of Impact Communications’ clients have attended and/or spoken at the conference. The feedback is consistently good. The T3 community is unique – totally different from a standard industry gathering,” Swift said.

SESSION CHOICES ABOUND

The T3 Advisor Conference will feature eight general sessions and nearly 30 breakout sessions. “We begin the morning of February 12 with an (optional) ethics session. Preconference sessions will begin at 10:00 that morning. Our big general session speaker, the ever-colorful Tom Giachetti, will take the main stage at 3:30 pm central time. Giachetti is Chair of the Securities Practice Group at the well known law firm Stark & Stark; he will talk about cybersecurity and how advisory firms should be taking steps to protect their firms and their clients from data theft and hackers,” Drucker said.

February 13 will feature main stage presentations from eMoney, MoneyGuidePro, Schwab, Riskalyze and RiXtrema. “Neesha Hathi, senior vice president of Advisor Services Technology Solutions at Charles Schwab, is always great,” said Drucker. “I’m really looking forward to her general session.”

“Breakout sessions will feature many of the amazing sponsors and tech providers in attendance,” added Bruckenstein. “I’m especially looking forward to the custodian panel, the digital marketing session, the emerging technology sessions, the big data session and the estate planning for digital assets session.

“On February 14 the conference concludes at 5:00 – after all we want everyone to get home to their Valentines that night. This final day is jam packed with break out sessions and main stage presentations from Laserfiche, Black Diamond, Advicent and FAStech,” Bruckenstein explained.

BIG ANNOUNCEMENTS AND SUPER DEMOS EXPECTED

Several companies will make major announcements and reveal their latest-and-greatest innovations at the conference. One example: eMoney will be demonstrating their next generation emX platform at the 2015 conference. “This could very well be the most significant product upgrade of the year,” said Bruckenstein. “If you are a current eMoney user, you are going to absolutely love the new version. If you’ve never seen eMoney, you are going to want to check it out. The platform is more responsive, the graphics are superior, and the report templates are much improved. A new, clean, functional home page provides key data the minute you log on. An analytics section allows you to better understand the drivers of your business at a glance. Goal based planning has been added to the package for the first time. Account aggregation and the client portal, perhaps the two things that eMoney has long been known for, are better than ever,” Bruckenstein concluded.

InvestmentNews is the exclusive media sponsor for the T3 Advisor Conference.

For breaking news, use the official Twitter hashtag #T32015. Join the [@T3fan](#) Community on Twitter or “like” the [T3 Facebook page](#) for other updates. Additional details and about the conference can be found on the T3 website www.TechnologyToolsForToday.com.

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