CPA Practice Advisor

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Joel Bruckenstein, David Drucker and Thirteen Industry Experts Provide Insights

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Internationally acclaimed experts on technology in the financial services industry, David Drucker and Joel Bruckenstein, are releasing their second book, "Technology Tools for Today's High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours."

Thirteen financial industry subject matter experts weigh in on the critical components of technology that every financial planning practice should utilize. Financial advisors will learn how to drastically reduce paperwork, slash overhead costs, improve efficiencies, better market and communicate to current and target clients, and continue to meet the ever-changing compliance standards.

"We engaged the help from the gurus of investment advisor office technology to give advisors a thorough review of the critical components of technology they should utilize to efficiently grow and maintain a successful practice," explains David Drucker.

The topics covered by financial planning leaders are:

- "Selecting the Right CRM System" by Davis D. Janowski, Technology Reporter at InvestmentNews
- "The Future of Financial Planning Software" by Bob Curtis, CEO and President at PIEtech, Inc. (creators of MoneyGuidePro™)
- "The Future of Financial Planning Software and the New Client-Advisor Relationship" by Dr. Linda Strachan, Vice President, Product Management, Zywave (makers of NaviPlan®)

- “Portfolio Management Software” by Mike Kelly, President, Back Office Support

- “Client Portals and Collaboration” by Bill Winterberg, Technology and Operations Consultant, FPPad.com, and Technology Writer for MorningStarAdvisor.com
- “The Cloud: Using a Cloud Based IT Infrastructure to Enhance Profitability” by J.D. Bruce, MS, CPA, PFS, President, Abacus Wealth Partners
- “Digital Signature Technology” by Dan Skiles, Executive Vice President, Shareholders Service Group
- “Innovative Software and Technologies Implemented at One of America’s Leading Advisory Firms” by Louis P. Stanasolovich, CFP®, Founder and President, Legend Financial Advisors, Inc. and EmergingWealth Investment Management, Inc. (with Christopher J. Kail and Sherri M. Slafka)
- “Virtual Staff Sparks Growth, Profitability and Scalability” by Jennifer Goldman, CFP®, President, My Virtual COO
- “ROI – The Holy Grail of the Technology Purchase Decision” by Timothy D. Welsh, CFP®, President and Founder, Nexus Strategy, LLC

The book is available on Amazon at: Technology Tools for Today’s High Margin Practice.

Tom Nally, President, TD Ameritrade Institutional, says this about the new 240-page, hardcover book: “Drucker and Bruckenstein have brought together the industry’s top tech minds to create a roadmap for advisors looking to achieve scale and profitability through better use of technology. Dave and Joel have the exceptional ability to see the ‘bigger picture’ and provide a fresh perspective on how advisors can maximize their technology investments.”

Stuart DePina, Group President, Envestnet/Tamarac, remarks: “Joel and David have taken the complex subject of increasing profitability and efficiency though technology and assembled the information in an easy to understand format, drawing on the expertise of longtime industry leaders to supplement their own. They are uniquely qualified to provide a knowledgeable perspective, given their singular focus on RIA technology over the years. If you're an RIA that's looking to streamline costs

list of contributing authors will also be included at the conference," said Joel Bruckenstein.

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