INVESTMENT ADVISOR'S FINANCIAL PLANNING TECHNOLOGY PARTNERS

EMPLOYING THE RIGHT technology is meant to make your life easier, right? Wrong. The right technology will allow you to provide more and better services to your clients, but "ease of use is always a tradeoff," says Greg Friedman, "it's not necessarily a good thing." Friedman, the wealth manager who also is the co-founder of the CRM software firm Junxure, suggests several steps if you want to make better use of your hardware and software. At least once, he fires up each PC in his office and right-clicks on "properties" to see how that machine is actually being used and what's actually installed on it. He's got another suggestion when it comes to how well or poorly your installed software and hardware is being used: ask your employees. They'll tell you what works and what doesn't, and can keep you from misspending your technology budget.—**James J. Green**

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
Act4Advisors • Alpharetta, Georgia • 800-831-7636 • www.act4advisors.com			
Act4Advisors	Customized ACT! interface for client and contact management	Both	$199/Optional
Scan and Organize for ACT!	Scanning and document management add-on program to ACT!	PC	$179/Optional
Adhesion Wealth Advisor Solutions • Charlotte, North Carolina • 888-295-8351 • www.adhesionwealth.com			
WealthADV UMA Platform	Unified managed accounts with overlay portfolio management	Web	Varies/Varies
WealthADV Client Reporting	Unified household reporting, managed back office services	Web	Varies/Varies
Advent Software, Inc. • San Francisco, California • 800-685-7688 • www.advent.com			
Moxy	Trade order management solution	PC	NA/NA
Advent Back Office Services (ABOS)	Outsourced service allows clients to leverage Advent's software	Both	NA/NA
Advent Corporate Actions (ACA)	Reports and facilitates decisions associated with corporate actions	Web	NA/NA
Advent Custodial Data (ACD)	Collects, consolidates, and electronically delivers custodial data	PC	NA/NA
Advent Portfolio Exchange (APX)	Portfolio management and reporting solution with integrated CRM	Both	NA/NA
Advent Wealth Service (AWS)	Outsourced data management, reconciliation, and reporting services	Web	NA/NA
Axys	Turnkey portfolio accounting and reporting solution	PC	NA/NA
AdviceAmerica • Fremont, California • 510-824-3777 • www.adviceamerica.com			
AdvisorVision	Comprehensive financial planning and asset allocation system	Web	$1,495 annually/Included
ClientVision	MS Outlook-based client relationship management system	Web	$395 annually/Included
Advisor Products • Westbury, New York• 888-274-5755 • www.advisorproducts.com			
Personal Client Portals	Client communication system, performance, reporting, and marketing tool	Web	Varies/Varies
Advisor Software, Inc. • Lafayette, California • 925-299-7782 • www.advisorsoftware.com			
ASI Client Acquisition Solution	Portfolio construction, diagnostics, and proposal generation	Web	$995 annually/None
Advisor Tools, Inc. • Lansing, Michigan • 888-274-5755 • www.advisorproducts.com			
Harvest-Time.net	Retirement planning program for professional investment advisors	PC	$795/$300 annually
AdvisoryWorld • Sherman Oaks, California • 800-480-3888 • www.advisoryworld.com			
ICE Hypotheticals	Hypothetical illustrations and underlying holding analysis	Web	Varies/Varies
Integrated Capital Engine (ICE)	Portfolio analysis and financial planning platform	Web	$395/$480 annually
ICE Monte Carlo Plug-In	Monte Carlo simulator for use with ICE	Web	None/$242 annually
ICE Optimization Plug-In	Goals- and risk-based optimizer for use with ICE	Web	None/$242 annually
ICE Scanalytics Plug-In	Investment screening, factor, and style analysis for use with ICE	Web	None/$242 annually
Power Optimizer	Asset allocation and portfolio modeling optimizer	PC	$395/$746 annually
RAMCAP	Asset allocation and portfolio modeling optimizer	PC	$395/$746 annually

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
AdvisoryWorld (Continued)			
ScanData	Mutual fund and stock screener	PC	None/$140 annually
Analytics	Investment selector based on factor analysis	PC	None/$140 annually
ICE Integration	Auto-sync Albridge, Advisor Assistant, Schwab, LPL, and more	Web	None/None
Databases	Asset class, mutual funds, ETFs, stocks, VAs, and SMAs	Both	None/$242 annually
Customization	Customize application to match firm's needs	Both	Varies/Varies
Advisys, Inc. • Newport Beach, California • 800-777-3162 • www.advisys.com			
Back Room Technician	Needs analysis, client education and presentation material	PC	$499/$499 annually
Power Advisor	Portfolio management software for investment advisors	PC	Varies/Varies
Albridge Solutions, Inc. • Lawrenceville, New Jersey • 877-252-9963 • www.albridge.com			
Albridge Wealth Reporting	Web-based portfolio accounting and performance reporting	Web	Varies/None
ASC brokersoft • Mar Vista, California • 310-398-0232 • www.brokersoft.com			
SDR Securities Data Repository	User controlled data aggregation, reporting, and research	PC	Varies
P2Excel	Loads Pershing raw data files to Excel	PC	Varies
BNA Software • Washington, D.C. • 800-424-2938, option 3 • www.bnasoftware.com			
BNA Income Tax Planner w/50 States	Calculates/projects individual federal and state income taxes	PC	$835/$625 annually
BNA Estate & Gift Tax 706 Preparer	Automates preparation of IRS Form 706 plus amended returns	PC	$695/$595 annually
BNA Estate & Gift Tax 709 Preparer	Automates preparation of IRS Form 709	PC	$430/$275 annually
BNA Estate & Gift Tax Planner	Calculates/projects federal and state estate and inheritance taxes	PC	$1,495/$835 annually
BondDesk Market Data • Summit, New Jersey • 908-522-8950 • www.bonddeskgroup.com			
BondDesk Market Data	Financial market data for Microsoft Excel	PC	$100 monthly/None
Brentmark Software, Inc. • Orlando, Florida • 800-879-6665 • www.brentmark.com			
Charitable Financial Planner	Illustrates split-interest charitable giving techniques	PC	$349/$99 annually
Estate Planning QuickView	Compares seven estate disposition plans for each spouse	PC	$249/$59 annually
Estate Planning Tools	Presents 100 different estate and financial planning techniques	PC	$429/$119 annually
Kugler Estate Analyzer	Comprehensive estate planning analysis and presentation tool	PC	$595/$199 annually
PFP Notebook	Personal financial planning software	PC	$595/$199 annually
Retirement Distributions Planner	Calculates required minimum distributions and 72(t)	PC	$249/$79 annually
Retirement Income Navigator	Optimizes income and asset allocation	PC	$299/NA
Retirement Plan Analyzer	Qualified plan and Roth IRA analysis and presentation tool	PC	$595/$179 annually
Savings Bond Toolkit	Organizes, manages, and retitles clients' savings bond portfolios	PC	$99/$69 annually
BridgePortfolio • Chicago, Illinois • 800-610-8882 • www.bridgeportfolio.com			
Total Account Solution	Comprehensive back office outsourcing solution	Web	Varies/Varies
Small Account Solution	Turnkey outsourcing solution for small accounts	Web	Varies/Varies
Reporting Only	Account downloads, reconciliation, reporting, and billing	Web	Varies/Varies
Customized Investment Advisory	Private label UMA, ETF, and mutual fund advisory platform	Web	Varies/Varies
Broadridge Investor Communication Solutions (formerly ADP Investors) • New York, New York • 800-353-0103 • www.broadridge.com			
ProxyEdge	Electronic voting, record-keeping, audit, and disclosure tool	Web	$2,500+/None
ByAllAccounts, Inc. • Woburn, Massachusetts • 781-376-0801 • www.byallaccounts.com			
Custodial Integrator	Provides "reconciliation-ready" data for RIAs, family office, and wealth mgrs.	Both	NA/NA

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
Captools Company • Issaquah, Washington • 800-826-8082 • www.captools.com			
Captools.net	SQL-based portfolio management system for one to many users	PC	$2,000/$1,000 annually
CashEdge, Inc. • New York, New York • 212-478-6000 • www.cashedge.com			
AllData Account Aggregation	Financial account aggregation for financial advisors	Web	Varies/NA
Cheshire Software, Inc. • Newton Highlands, Massachusetts • 800-734-6734 • www.cheshire.com			
Cheshire Wealth Manager	Comprehensive financial planning software	PC	$900/$900 annually
Client Marketing Systems, Inc. • Pismo Beach, California • 800-799-4267 • www.advisorsassistant.com			
Advisors Assistant	Portfolio and contact management CRM	PC	$399+/$239+ annually
The Consortium • Camarillo, California • 805-987-6115 • www.liftburden.com			
RIA Client Advisory Agreement	Creates custom client advisory agreements	PC	$149/None
RIA Forms & Research Library	30+ forms including IPS, new acct., privacy, best execution	PC	$349/None
RIA Self-Audit Kit	Audit checklist, document request, and audit information	PC	$249/None
RIA Sol. Agreement & Disclosures	Multi-forms including solicitor's agreement and client disclosure	PC	$149/None
Business Continuity Plan	Disaster recovery/business continuity planning template	PC	$299/None
RIA Supervisory Prod./Cd. of Ethics	Customizes compliance manuals, procedures, and codes of ethics	PC	$299/None
Cornerstone Revolutions, Inc. • Portland, Oregon • 888-314-7001 • www.poweradvisortools.com			
PowerAdvisor	Portfolio management system, reports and service bureau	PC	$4,600/$1,500 annually
PowerTrade	Rebalancing and trade order management system	PC	$8,000/$6,500 annually
Efficient Technology, Inc. • Claremont, California • 877-456-7845- • www.quikforms.com			
Quik! Forms Library ENTERPRISE	Integrates with over 30 CRMs to prefill forms	Both	$19.99 monthly/None
Quik! Enterprise Solution	Suite of web-based forms automation solutions	Web	Varies/Varies
Emerging Information Systems, Inc. • Winnipeg, Manitoba, Canada • 888-692-3474 • www.eisi.com			
NaviPlan Standard	Full range of planning tools for a wide range of clients	PC	$799 annually/NA
NaviPlan Extended	Sophisticated planning for the ultra-high net worth	PC	$1,299 annually/NA
Profiles Forecaster	Ready-to-present basic financial analysis	PC	$599 annually/NA
Profiles Professional	Detailed financial advice for the mass affluent	PC	$1,049 annually/NA
E-Z Data • Pasadena, California • 800-777-9188 • www.ezdata.com			
SmartOffice	Web-based practice management for financial advisors	Web	$75 monthly/Included
eZ-Adviser • Birmingham, Alabama • 877-471-3054 • www.ez-adviser.com			
eZ-Adviser	E-mails asset advice, IPS, and invoices to 401(k) participants	Web	$300 monthly/None
Fiduciary360 • Sewickley, Pennsylvania • 866-390-5080 • www.fi360.com			
Fi360 Platinum Toolkit	Research, asset allocation, IPS, reports, and proposals system	Web	$1,375 annually/None
Fi360 Gold Toolkit	Research, asset allocation, IPS, and reports software system	Web	$975 annually/None
Fi360 Silver Toolkit	Research, asset allocation, IPS, and reports software system	Web	$675 annually/None
Financial Guidance, a division of Scivantage, Inc. • Jersey City, New Jersey • 888-256-0765 • www.financialguidance.com			
Financial Compass (desktop)	Simplified, sales oriented financial analysis	PC	$595 annually/None
Financial Compass (online)	Simplified, sales oriented financial analysis	Web	$595 annually/None
Methuselah	Interactive, comprehensive financial, and estate planning on three levels	PC	$1,095 annually/None
Financial Navigator, Inc. • Mountain View, California • 650-962-0300 • www.finnav.com			
Navigator	Integrated portfolio mgmt. and acct. solution for high-net-worth investors	PC	$80,000/$35,000 ann.

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Financial Planning Consultants, Inc. • Middletown, Ohio • 800-666-1656 • www.financialsoftware.com			
Client Builder	Presentation software to engage more planning clients	PC	$795/NA
Plan Builder	Comprehensive and modular personal financial advisors	PC	$995+/$670 annually
Practice Builder	Client relationship management for financial advisors	PC	$995+/$285 annually
Financial Psychology Corporation • Sarasota, Florida • 800-735-7935 • www.financialpsychology.com			
Moneymax Profile	Provides targeted communication and trait characteristics	Web	$195/None
Folio Institutional • Vienna, Virginia • 888-485-3456 • www.folioadvisor.com			
FOLIO*Advisor*	Advisor custody, trading and portfolio management services	Web	NA/NA
Forefield, Inc. • Marlborough, Massachusetts • 800-550-6831 • www.forefield.com			
Forefield Advisor	Sales, education, and client communication tool	Web	$399 annually/None
Forefield Seminars	FINRA-reviewed presentation service with workbooks	Web	$199 annually/None
Forefield Newsletters	Monthly financial newsletter service (PDF and e-mail)	Web	$399 annually/None
Foundation Source • Fairfield, Connecticut • 800-839-0054 • www.foundationsource.com			
Private Foundation Administration	Complete private foundation administration	Web	$4,000+ annually/NA
FuneralTrusts.com • Spring Lake Heights, New Jersey • 732-280-4026 • www.funeraltrusts.com			
Irrevocable Funeral Trusts	Educational service to market irrevocable funeral trusts	Web	None/None
GSL Galactic Consulting • Indianapolis, Indiana • 317-254-0385 • www.garylesser.com			
SIMPLE Illustrator	Calculates, allocates, illustrates SIMPLE IRA contributions	PC	$150/$150 annually
QP-SEP Illustrator	Calculates, allocates, illustrates SEP contributions	PC	$150/$150 annually
Impact Technologies Group, Inc. • Charlotte, North Carolina • 800-438-6017 • www.impact-tech.com			
PlanLab	Enables streamlined financial planning processes	Web	Varies/Included
INDATA • San Diego, California • 888-454-4060 • www.indataweb.com			
IMS 7	Trade order management, compliance, portfolio accounting	Both	NA/NA
Interactive Data Corporation • Bedford, Massachusetts • 781-687-8800 • www.interactivedata.com			
BondEdge	Structured finance cash flow engine and library (fixed income analytics)	PC	Varies/None
Cost Basis Service	Automates calculation/delivery of cost basis information	Both	Varies/None
Market-Q	Delivers real-time, streaming market data	Both	Varies/None
eSignal Pro	Delivers real-time, streaming market data	PC	Varies/None
IW Financial • Portland, Maine • 207-773-2333 • www.iwfinancial.com			
IWF Workstation	Customizable SRI portfolio construction and evaluation software	Web	Varies/None
Leimberg Associates, Inc. • Havertown, Pennsylvania • 610-924-0515 • www.leimberg.com			
Financial Analyzer II	Offers more than 75 financial planning calculations	PC	$129/None
Retirement Plan Analyzer	Evaluates pension/profit-sharing plan distribution strategies	PC	$595/$179 annually
Charitable Financial Planner	Calculates charitable gift annuities, pooled income funds , and more	PC	$349/$99 annually
Toward a Zero Estate Tax Presentation	Estate tax planning Power Point presentation	PC	$249/$49 annually
Long-Term Care Presentation	Long-term care insurance Power Point presentation	PC	$249/None
Gifts That Give, Gifts That Give Back	Charitable giving Power Point presentation	PC	$249/None
Leimberg & LeClair, Inc. • Havertown, Pennsylvania • 610-924-0515 • www.leimberg.com			
NumberCruncher	Estate and financial planning software	PC	$395/$99 annually
Estate Planning Quickview	State-law-sensitive state- and tax-planned software	PC	$249/$49 annually
DecoupleCruncher	Estate and financial planning software	PC	$299/$99 annually

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
Leimberg & LeClair, Inc. (continued)			
Life Settlement NumberCruncher	Insurance and financial planning software	PC	$299/None
Litman/Gregory's AdvisorIntelligence • Orinda, California • 800-776-9555 • www.advisorintelligence.com			
AdvisorIntelligence	Research, recommended funds list, and client communications	Web	$1,995 annually/None
LiveOffice • Torrance, California • 800-374-2032 • www.liveoffice.com			
AdvisorSquare	Builds, hosts, and manages Web sites for advisors	Web	$250+/$25+ monthly
AdvisorMail	E-mail/IM archiving and compliance systems for advisors	Web	Varies/Varies
Lumen Systems, Inc. • San Jose, California • 800-233-3461 • www.lumensystems.com			
Financial Planning Professional	Comprehensive planning, analysis, and reporting system	PC	None/$795 annually
MasterPlan Financial Software • Vacaville, California • 800-229-5080 • www.masterplanner.com			
MasterPlan: The Analyst	Comprehensive and modular financial planning software	PC	$745/$600 annually
MaxPro Systems, Inc. • Orlando, Florida • 877-359-5322 • www.maxprosystems.com			
MaxAct Customization ACT!2009	Contact management software for sales and compliance	Both	Varies/None
Money Tree Software, Inc. • Corvallis, Oregon • 877-421-9815 • www.moneytree.com			
Silver Financial Planner	Interactive retirement planning software	PC	$495/$150 annually
TOTAL Planning Suite	Integrated financial planning software	PC	$850+/$350+ annually
Morningstar, Inc. • Chicago, Illinois • 866-608-9570 • http://corporate.morningstar.com/advisor			
Principia	Investment research software system	PC	Varies/NA
Advisor Workstation - Office	Web-based investment research and planning application	Web	$5,400 annually/NA
Advisor Workstation -Enterprise	Web-based investment research and planning application	Web	$2,975 annually/NA
myStockOptions.com • Brookline, Massachusetts • 617-734-1979 • www.mystockoptions.com			
myStockOptions.com	Employee stock options, restricted stock, and SARs tool	Web	$0-$189 annually/NA
National Compliance Services • Delray Beach, Florida • 800-800-3204 • www.ncsonline.com			
AML Policies	Template for developing anti-money laundering policy	PC	$199/NA
Disaster Recovery Planning Temp.	Template for developing disaster recovery plan	PC	$199/NA
Proxy Voting Policies & Procedures	Template for developing a proxy voting policy	PC	$199/NA
Investment Client Contracts	Contains five sample contracts	PC	$149/NA
RIA Compliance Manual	Written policies and supervisory procedures for fed./State RIAs	PC	$450/NA
Investment Adviser Reg. Manual	Covers regulations on all RIA activities	PC	$195/NA
Investment Policy Statement (IPS)	Provides sample investment policy statement	PC	$135/NA
Form ADV on CD-ROM	Allows users to complete Form ADV on CD	PC	$199/NA
National Collegiate Advisors, Inc. • Cedar Rapids, Iowa • 319-390-4344 • www.ncaconnect.com			
2009 EFC Calculator	EFC, answer keys, 3,200+ colleges, 'what-if' scenarios	PC	$1,299/$499 annually
Net Worth Strategies, Inc. • Bend, Oregon • 877-728-5964 • www.stockopter.com			
StockOpter.com	Stock plan participant communication and decision support	Web	$75 annually/None
StockOpter Pro	Equity compensation after tax cash flow strategy modeling software	PC	$1,195/$695 annually
NRS • Lakeville, Connecticut • 860-435-0200 • www.nrs-inc.com			
Resources	Monthly compliance workbooks	Web	$150+mo./$150+ mo.
EZ 2000 Reg. Forms Software	Creates, amends, and archives Forms ADV, U4, and U5	PC	$314/Incld. first year
Anti-Money Laundering Training	Training for reps, supervisors, and surveillance persons	Web	Varies/Varies
Online IA Policies & Prod. (State)	Customizable policies and procedures manual for state registered	Web	$495/$495 annually

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
NRS • (continued)			
Online IA Policies & Prod. (Federal)	Customizable policies and procedures manual for SEC registered	Web	$695/$695 annually
IA-info	Database of 30,000 federal- and state-registered advisors	Web	$800 mo./$800 mo.
ComplianceEssentials Ann. Review	Assists investment advisors managing tasks of compliance reviews	Web	$650/$650 annually
ComplianceEssentials for B/Ds	Online manual, forms, guides to meet FINRA requirements	Web	$3,150/$3,150 annually
Compliance in a Box	Documents and forms to help meet SEC/state requirements	Web	$675/$99 annually
ComplianceEssentials E-mail Mon.	Archives e-mails, administrative review capabilities software	Web	Varies/Varies
ComplianceEssentials for HF Advisers	Online manual, forms, guides to assist with SEC requirements	Web	$2,500/$2,500 annually
ComplianceEssentials for IAs	Online manual, forms, guides to meet SEC requirements	Web	$1,350/$1,350 annually
ComplyNet	Plain-English compliance and registration requirements and news	Web	$745/$745 annually
Oltis Software, LLC • Tucson, Arizona • 520-298-5000• www.financelogix.com			
Finance Logix: Visual Advisor	Comprehensive financial planning software	Web	$89.95 monthly/NA
Finance Logix: ShareLogix	Financial planning, portfolio analysis, client portal	Web	$95 monthly/NA
Orion Advisor Services, LLC • Omaha, Nebraska • 402-496-3513 • www.orionadvisor.com			
Orion Advisor Desktop	Portfolio accounting service bureau	Both	$15,000/None
PIEtech, Inc. • Powhatan, Virginia • 800-841-5312 • www.moneyguidepro.com			
MoneyGuidePro	Interactive financial planning SMARTware	Web	$1,295/NA
PlanPlus, Inc. • Lindsay , Ontario, Canada • 800-364-1293 • www.planplus.com			
PlanPlus Platinum	Financial planning solution integrating tools, technology, and process	Web	$390 monthly/NA
Web Advisor Gold	Financial planning software, back office integration	Web	$1,200 annually/NA
Web Advisor Silver	Financial planning software with daily price updates	Web	$900 annually/NA
Web Advisor Bronze	Web-based financial planning software	Web	$600 annually/NA
Planware, Inc. • Bethesda, Maryland • 866-320-0861 • www.integrate2000.com			
Integrate2000	Excel-based financial planning software	PC	$1,600/$900 annually
Prima Capital Holding, Inc. • Denver, Colorado • 888-301-2007 • www.primacapital.com			
PrimaGuide	Researches and evaluates wealth management products	Web	$10,000 annually/NA
AllocationGuide	Asset Allocation and proposal generation tool	Web	$5,000 annually/NA
ProTracker Software, Inc. • Hampton, New Hampshire • 603-926-8085 • www.protracker.com			
ProTracker Business Continuity Plan	Word template to outline business continuity & disaster recovery planning	PC	$150/None
ProTracker Compliance Manual	Word template that advisors tailor to the firm's procedures	PC	$150/None
ProTracker Advantage	Client-centered contact and practice management system	PC	$995/$495 annually
Sabermace Software Solutions • Westwood, Massachusetts • www.sabermace.com			
Sabermace Form ADV	Supports multiple applicants and integrates PDF out formats	PC	$269/None
Sawhney Systems, Inc. • Princeton, New Jersey • 800-850-8440 • www.execplanexpress.com			
ExecPlan Express	Comprehensive tax and financial planning software	PC	$299/$100 annually
ExecPlan	Comprehensive tax and financial planning software	PC	$1,995/$895 annually
SBPlanner.com • Spring Lake Heights, New Jersey • 800-717-2663 • www.sbplanner.com			
Platinum Planner	Client acquisition system delivering savings bond seminars & analysis	Web	$895/$599 annually
Scherrer Resources, Inc. • Exton, Pennsylvania • 800-950-0190 • www.brokersally.com			
Broker's Ally	CRM software for clients and prospect management	PC	$395/$195 annually
Web Ally CRM	CRM software for clients and prospect management	Web	Varies/Varies

Product	Platform: Primary Function	PC/Web	Price/Maintenance Charge: Single User
Schwab Performance Technologies • Raleigh, North Carolina • 800-528-9595 • www.schwabpt.com			
PortfolioCenter	Portfolio management and reporting software system	PC	$10,000/$2,000 ann.
PortfolioServices	Outsourced portfolio management and reporting solution	Web	$15,000/$15,000 ann.
Spectrum Input, LLC • Alpharetta, Georgia • 678-672-1538 • www.spectruminput.com.com			
PreciseFPWeb	Data gathering client questionnaire with export capability	Web	None/$179 annually
Steele Systems, Inc. • Los Angeles, California • 800-315-9002 • www.mutualfundexpert.com			
Steele Mutual Fund Expert	Mutual fund selection, analysis, presentation software	PC	$22+monthly/Same
SunGard • Wayne, Pennsylvania • 800-825-2518 • www.sungard.com			
WealthStation	Integrated wealth management platform	Web	Varies/Varies
Tamarac, Inc. • Seattle, Washington • 866-513-1620 • www.tamaracinc.com			
Tamarac Advisor	Automates portfolio monitoring, rebalancing, and trading	Web	$12,000 annually/NA
thinkorswim, Inc. (formerly known as Investools) • Chicago, Illinois • 800-547-8431 • www.thinkpipes.com			
thinkpipes	Flexible execution management system	PC	Varies/None
TimerTrac.com • Fruit Heights, Utah • 888-240-3415 • www.timertrac.com			
TimerTrac.com	Tracks the performance of over 600 active asset managers	Web	$179.95 annually/Same
TimeValue Software • Irvine, California • 800-426-4741 • www.timevalue.com			
TValue	Loan amortization and compound interest calculations software	Both	Varies/Varies
File In time	Due date management software	Both	Varies/Varies
TaxInterest	IRS/State interest and penalty software	Both	Varies/Varies
TValue Developer	Amortization engine	Both	Varies/Varies
TCalc	Web-based financial calculator	Both	Varies/Varies
PayrollPenalty	Loan amortization and compound interest calculations software	Both	Varies/Varies
Tax941	Loan amortization and compound interest calculations software	Both	Varies/Varies
Trust Builders, Inc. • Dallas, Oregon • 800-773-1138 • www.tbinc.com			
The Retirement Analysis Kit (TRAK)	Educates participants for retirement planning	PC	$545+/$195+ annually
Voyant, Inc. • Austin, Texas • 512-342-0079 • www.planwithvoyant.com			
Voyant Advisor	Financial interaction and collaboration suite	Web	$100 monthly/None
WealthEngine.com • Bethesda, Maryland • 800-933-4446• www.wealthengine.com			
FindWealthOnline	Client and prospect wealth identification and affiliation tool	Web	Varies/Varies
FindWealth Screening Services	Identifies and ranks clients and prospects to maximize sales	Web	Varies/Varies
Windam Capital Management, LLC • Cambridge, Massachusetts • 866-533-5529 • www.windhamcapital.com			
Windham Portfolio Advisor	Institutional software for asset allocation, risk mgmt., and cash flow planning	PC	Varies/None
Windham Financial Planner	Advisor software for asset allocation, risk mgmt., and wealth planning	PC	$6,000 annually/None
Windham Planner Express	Proposal and report generating software for financial advisors	PC	$1,800 annually/None
Wolters Kluwer Financial Services/GainsKeeper • Waltham, Massachusetts • 888-441-3339 • www.gainskeeper.com			
GainsKeeper/BasisPro	Calculates cost basis, capital gains, and wash sales	Web	$69+ annually/None
Zephyr Associates, Inc. • Zephyr Cove, Nevada • 800-789-5323 • www.styleadvisor.com			
StyleADVISOR	Analysis software for investment professionals	PC	$8,000/None
AllocationADVISOR	Asset allocation software for investment professionals	PC	$5,000/None