



# The Future of Practifi

What's new and what's next for  
all things Practifi

# Today in Review



**CRM is an active operating system, not a passive database**



**Operational discipline is the hidden driver of great client experience**



**Structured pipelines and role-based workflows turn service into growth**



**Clean data and operational quality are your biggest M&A valuation levers**





*The definition of CRM, and the design of CRM is going to change. We may even call it something else. It is going to have a lot of the same functionality, but it'll do it differently.*

JOEL BRUCKENSTEIN



# Defining Intelligent CRM

**Four criteria that help define a new category in CRM technology:**

- 1 AI is central to the architecture, not added to it
- 2 The product ships with a workforce, not a feature set
- 3 The foundations are built for the regulated enterprise
- 4 Pricing and packaging reflect a single product, not a stack



# 2018 Financial Advisor Fintech Solutions Map

<b>RISK TOLERANCE</b> riskalyze Financial DNA Fincube360 IPS Advisor Pro DataPoints totum RiskPRO Capta Preferences Pocket Risk TOLERISK finmason ATA Risk-Statist		<b>B2B ROBOS</b> AdvisorEngine INVESTNET Jemstep Follo Institutional BLACKROCK investcloud CIRCLEBLACK trizic Marstone Betterment motif Autopilot investmentPOD SIGFIG TradePMR DriveWealth RobustWealth Third Party		<b>OUTSOURCED CLOUD HOSTING</b> TRUE NORTH RIGHTSIZE workplace_itegria		<b>CYBERSECURITY</b> FCI entreda		<b>BEHAVIOR ASSESSMENTS</b> Financial DNA finworx DataPoints ROL Advisor	
<b>FEE PAYMENTS</b> AdvicePay		<b>ADVISORY FEE BILLING</b> BILLFIN billPort		<b>SPECIALIZED PLANNING</b>				<b>RETIREMENT</b> Bucket Bliss MAXIMIZE MY SOCIAL SECURITY RetireUp RA INCOME SOLVER SSANALYZER	
<b>BUSINESS INTELLIGENCE/METRICS</b> 3Xequity AdvisorClarity advisor metrix true				<b>REBALANCING SOFTWARE</b> ENVESTNET Tamarac *ORION TRADE WARRIOR iRebal BlazePortfolio LIFEYIELD REDBLACK tRx OVERLAY RebalX™ Smartleaf		<b>FINANCIAL PLANNING</b> MoneyGuidePro* ESPANNER CHESTERHIRE SOFTWARE W N P R R NavPort Proflex SUNGARD WealthStation financeware.com MONEY TREE SOFTWARE ENVESTNET Finance Logix inStream wealthtrace goalgamiPro* ExecPlan eMoney figlo RIGHTCAPITAL Advizr			
<b>INVESTMENT DATA/ANALYTICS</b> FI360 MORNINGSTAR ADVISORYWORLD FACTSET Bloomberg Terminal Windham Labs Zephyr CHAIKIN PortfolioVisualizer finmason kwant YCHARTS		<b>PORTFOLIO MANAGEMENT</b> Follo Institutional ENVESTNET Tamarac ADVIZON SS&C ADVENT Anya & Black Diamond blueleaf CROESUS ALBRIDGE SOLUTIONS *ORION pathofpathway FORTITUDE SYSTEMS INVESTEDGE ANASTAR Office ADDEPAR COL DYNAMIX FinFolio Capitect INSTITUTIONAL Vestmark Broadridge		<b>ALL-IN-ONE</b> ENVESTNET Tamarac HANLON ORANJ Advyzon RobustWealth AdvisorEngine		<b>ONGOING PLAN MONITORING</b> MyPlanMap			
<b>STRESS TESTING</b> MacroRisk riskalyze Hidden Levers RIXXtreme FI360 Dimensional finmason		<b>401(K) IMPLEMENTATION</b> FI360 nextcapital Betterment BUSINESS Vivuifit		<b>CRM</b> ENVESTNET Tamarac ADVISORS ASSISTANT JUNXURE REDTAIL TECHNOLOGY ProTracker Software Wealthbox EBIX CRM OVERLAYS PROCESS XLR SS&C Skilence PractiFI		<b>CLIENT DATA GATHERING</b> PreciseFP TOUCHSTONE FUTUREWAY LifeArcPlan		<b>SOCIAL MEDIA ARCHIVING</b> RegLul actiance erado globalRELAY smarth PageFreezer	
<b>FORMS MANAGEMENT</b> ONKI agreement		<b>DIGITAL MARKETING</b> gainfully Vektorfy HEARSAY STRAT CRACKER		<b>COMPLIANCE</b> COMPLIANCEHERO SmartRIA		<b>SCHEDULE APPS</b> calendly timetrade ScheduleOnce youcanbookme		<b>DOCUMENT MANAGEMENT</b> DocuSpace Laserfiche netdocuments Worddox HELLOSIGN RightSignature	
<b>MIND MAPPING</b> asset-map mindmeister		<b>ACCOUNT AGGREGATION</b> Aquamulate ENVESTNET VOGLER eMoney Broadridge QUOVO ByAllAccounts		<b>CLIENT FILE SHARING</b> FutureVault EGN*TE Dropbox box ComConnect ShareFile GoogleVault		<b>CLIENT PORTAL</b> W WEALTHACCESS CIRCLE BLACK eMoney			

La test version available at: [kitces.com/fintechmap](http://kitces.com/fintechmap)

FINANCIAL PLANNING

FINANCIAL PLANNING

Logos for eMoney, RightCapital, MoneyGuide, NaviPlan, moneytree, Chesire Software, ExecPlan, inStream, Boldin, Plan Tech Hub, voyant, wealthtree, MAXIFI, CONQUEST, FinDash, WealthStream.

PLANNING LIGHT

Logos for Libretto, ECF, Savology, nebo, GMD, Kerdora, advisys, Camel Concepts, ProjectionLab, Fiduciary genius.

SPECIALIZED PLANNING

RETIREMENT

Logos for SSANALYZER, INCOME LAB, RAINBOW RETIREMENT SECURITY, Slavy Social Security Planning, INCOME SOLVER, timeline, Bucket Bliss, JOURNEYGUIDE, Income Discovery, BigPicture, AnnuityCheck, HIGHWAY CONSTRUCTION, ONPENTE, RA.

ESTATE

Logos for wealth.com, fpalpha, encor.state, trust@will, Vanilla, Brentmark, Calc Estate Planner, Your:folio, EstateView, LUMINARY.

LEGACY

Logos for everplans, LegacyShield, LifeSite, primm, Trustworthy, BEQUEST, COVET.

TAX

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EQUITY COMP

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EDUCATION

Logos for College Aid Pro, CFS, AMANTIE, HealthView, Waterlily, HighPeak.

CASH MANAGEMENT

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CASH FLOW AUTOMATION

Logos for currence, Sequence.

HEALTHCARE/MEDICARE

Logos for #65, Healthpilot, AMANTIE, HealthView, Waterlily, HighPeak.

BUSINESS VALUATION

CHARITABLE GIVING

INVESTMENT MANAGEMENT

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Logos for AssetBook, Schwab Advisor Portfolio Connect, Vi4, Advisor360, FIRST ESTATE, EZPo1.io, POWERADVISOR LLC.

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Logos for Smartleaf, SOFTPAK, FLYER, REDBLACK, LIFEYIELD, alphathena.

PORTFOLIO MANAGEMENT

Logos for ORION, Black Diamond, entaflo, office, NDEX, onevest, Profile, SMARTX, ALYXCHANGE, SYSTEM, OSYTE, amplify, ADDEPAR, digit, Capitect, Vestmark, FinFolio, blueleaf, ADVANTAGE, ALTA FID, ALLOCATERE, MSCI Wealth, Ridgeline, GENESIS, CapTools, AdvisorEngine, SUMMIT, wove, AVER.

HELD-AWAY ASSETS

Logos for Punteru, AbsoluteCapital, FutureCapital, POST LIFE PLAN.

CUSTODIAL PLATFORM

Logos for ClearKicks, Altruist, NETX360, Wealthscape, Interactive Brokers, TradeMill, AXOS, RAYMOND JAMES, APEX, innovayte, eQuit, Betterment, ASSETMARK, Goldman Sachs, ADVICEWORKS.

INVESTMENT DATA/ANALYTICS

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401(K) IMPLEMENTATION

Logos for Betterment, Vestwell, FIDUCIARY, guideline, 40130, Human Interest.

RISK TOLERANCE

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Logos for FileMole AI, Sear West, Filenoter, Zeplyn, parodino, DataDasher, NEVIS, Gran, Intellisc, CONTINUUM, Fint M, by Advisor.

CLIENT DATA GATHERING

Logos for PreciseFP, Joffrom, InStatus, LifeArcPlan, Instruct, smartdata, Overvue, zooifi.

CLIENT FEEDBACK

Logos for HIXA, ABSOLUTE, PRAETOR.

AI ASSISTANT

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BEHAVIOR ASSESSMENTS

Logos for DataPoints, Financial DNA, Money Quotient, ROL, Unitifi, FINLITI, LIFE STAGE INSIGHTS, ATLAS POINT, Qualitate, INVESTING TOU, SHAPING WEALTH, wealthify, C&J INNOVATIONS, COREnergy, knomee.

ADVICE ENGAGEMENT

Logos for InPATH-FINDER, asset+map, HENRI, visiWealth, LUMIANT, knudge, InvestSuite, NOVATRA, Forward Lane, LIFEHUB, Responsive.

CLIENT PORTAL

Logos for eMoney, investcloud, Financial, Monarch, KUBERA, CRK, BLACK, eVestech, wavvest, FAMILY OFFICE PORTAL, vyzer, SUMMITAS, BENTOLE, leafplanner, COPIA, Strad:Pro, WealthTeamWork.

SCHEDULE APPS

Logos for Calendly, OnceHub, Bookings, acuity:scheduling, GReminders, Engage ware, YouCanBookMe.

OPERATIONS

CRM

Logos for Wealthbox, REDTAIL, salesforce, Advyzen, AdvisorEngine, INVESTMENT Tamarac, Practifi, Microsoft Dynamics 365, SmartOffice, Black Diamond, Less Annoying CRM, NEXJ, equisoft, ugru, Quivr, Spaces, Allitude, ADVISORS AGGREGATOR, Poladin, shellblock, start, ProTracker Software, AdvCity, Maximizer, Leaders by Advisor360, AdvisorCRM, TOOLKIT.

CRM OVERLAYS

Logos for XIRB, WealthSnap, redcapture, Method Plan.

ADVISORY FEE BILLING

Logos for AdvicePay, BILLFIN, BaySis, bill, SMARTKX, Advisor BOB, BillPro.

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Logos for Smartria, COMPLY, ORION, MCO, ComplianceAlpha, RIAV, Regful, FILE|13F, RED OAK, Hadrius, complete.

Logos for identified, amp, ReplyAssist, WealthReach, spaces.

ADVISOR LEAD GEN

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PROPOSAL GENERATION/SALES ENABLEMENT

Logos for Nitrogen, capintel, V R G L, sherpas, 401(K) PROPOSALS, Elements, invyza, Powder, ExhibitA, PLANPRO, equisoft/analyze, TIFIN WEALTH, HOLISTICO, fiduciary, planpart.

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FORMS-ONLY

Logo for Qunk!

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Logos for DocuSign, Adobe Sign, Dropbox Sign, RightSignature, SIGNIX.

CLIENT FILE SHARING

Logos for ShareFile, EGNYTE, HUBLY, finpace, conga, Cloudbox, FutureVault, box, FutureVault, Cloudbox, conga.

# The Hidden Toll of Too-Many Point Solutions

## **Integration Demand and Ongoing Issues**

Disconnected data silos lead to manual workarounds and loss of a single source of truth.

## **Increased Support Complexity**

Dealing with multiple vendors creates confusion and slows resolution times.

## **Greater Risk Surface**

Every new application introduces unique security and compliance vulnerabilities.

## **Growing Operating Friction**

Constant context switching between tools erodes team productivity and focus.

## **Diluted Accountability**

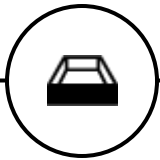
When systems fail, vendors blame each other, leaving you without a clear resolution path.

## **Higher Cumulative Cost**

The hidden expense of redundant features and administrative overhead adds up.



# Different Approaches to AI Adoption



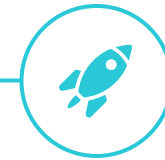
## Not yet

Focused on getting the fundamentals right. Clean data, consistent processes, and a CRM your team actually uses.



## Experimenting

Have tested a few tools—like AI notetakers or drafting assistants—to learn what is useful versus just hype.



## Actively adopting

AI is integrated into workflows. You are thinking beyond features and scaling how your team works.



# Life With **Intelligent CRM**

 **"Can you pull that report for me?"**

Answers surface before anyone has to ask.

 **"I can't find that data anywhere."**

Nothing goes missing when the CRM captures it automatically.

 **Tasks no one created — or owns.**

The system sees what happened and creates the follow-up itself.

 **"How should I set this up?"**

Guided configuration that helps firms get more out of what they already have.

# Coming Soon: Practifi's Own Intelligent CRM

We're building an AI-native CRM experience on the same Practifi foundation. Not a bolt-on, but a full alternative for firms ready to go all in.

## **AI-native experience**

A reimagined wealth CRM with AI at the core, ushering in a new era of efficiency, effectiveness, and enjoyment

## **Compliance-first**

Best-in-class user access control, cybersecurity, and monitoring capabilities

## **Enterprise-grade foundations**

Capably handles the real-world complexity of large firms, from data to workflows to servicing models



# What Practifi's Intelligent CRM Means for You

## ☑ **Your Skills Transfer Seamlessly**

The work you've done configuring Practifi — workflows, data structures, processes — carries across. Nothing is thrown away.

## ☑ **No Migration Overhead**

Same foundation means no painful data moves, no rebuilds, no starting from scratch.

## ☑ **First Access to AI Skill Development**

As we build out AI capabilities, adopting firms are at the front of the line, shaping what gets built and learning it first.

## ☑ **Less Time on Tasks That Don't Need You**

The system handles the routine. You focus on the work that actually requires your expertise.

