LEGACY ADVISORS NETWORK

TOOLS TO RUN YOUR OBA BUSINESS

recommended by your LAN peers

The following tools are platforms LAN members are either using or interested in learning more about. This infographic captures a wide variety of tools designed to support your clients and your back office operations.

PRACTICE MANAGEMENT

Create efficient processes with workflows, project management, CRM, client tracking and team and client collaboration.

Monday

Asana

Hubly

Redtail

Pipedrive

Wealthbox

BUILDING FINANCIAL & TAX PLANS

Comduct comprehensive financial planning with interactive discovery processes and personalized, actionable implementation plans.

ValuCompass

Capitaliz

Asset+Map

FP Alpha

Wealth Building Cornerstone

RightCapital

Life-centered approach to discovery & planning:

ROL Advisors

Tax planning:

Holistiplan

Risk alignment, portfolio analytics and research, account monitoring & trading:

Riskalize

MARKETING & LEAD GENERATION

From creating and delivering a clear message to leveraging client-facing content for lead gen, check these out:

Messaging framework at MyStoryBrand.com

StoryBrand

Content & Lead gen platforms:

Advisor Stream

Snappy Kraken

Precise FP

The Value Builder System™

Easiest email platform + MM approved:

MailChimp

Video email platforms;

QuickPage

BombBomb

SendSpark

OneMob

Digital Business Card:

Popl

Best QR code generators:

Beaconstac

qr-code-generator

INVOICING & PAYMENT PROCESSING

For invoicing, billing and account management:

Invoiced

FreshBooks

QuickBooks

For ACH, credit and debit cards and real-time payments:

Square

Stripe

Payliance

Authorize.net

CUSTOMER TOUCH

Create quizzes to engage customers and webinar attendees:

Kahoot

Estate planning & organization:

Nokbox

Legacy Letter Challenge

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