NEWS

For Immediate Release

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T3 TECHNOLOGY CONFERENCE ADDS TIMELY NEW SESSIONS TO THE 2012 AGENDA

Joel Bruckenstein and David Drucker Bring New Insights to Financial Advisor Attendees

December 8, 2011 (Dallas, TX) – Joel Bruckenstein and David Drucker, producers of the 7th Annual **"T3" Technology Tools for Today™ Conference** to be held at the Hilton Anatole in Dallas, Texas, Feb. 16-18, 2012 today announced additional sessions to the conference agenda.

"Advisors need to be at the forefront of technology, especially if it means a better client experience. We are thrilled to present some of the truly impressive technology that providers have created for financial advisors," said Joel Bruckenstein, CFP®. "This year we will discuss fascinating topics such as the **Death of the Application: What Real Integration Looks Like.** Moderated by J.D. Bruce of Abacus Wealth Partners, the panelists will include technology experts from Orion, Tamarac, Black Diamond and Interactive Advisory Software (IAS)."

"We look forward to having some great sessions on **cloud computing**," adds Bruckenstein. For example, **Weathering the Storm: How to Move to the Cloud Without Getting Rained On**, will provide guidance on how to make a successful transition to the cloud."

"We'll also look at the R**eturn on Your Technology Investment**—the ROTI," said David Drucker, CFP®. "New IT systems are serious, expensive and potentially risky investments. This session is designed to help financial advisors better understand how a ROTI analysis can take some of the risk out of their IT investments." The ROTI panel of experts will include Tim Welsh for LaserFiche, Reed Colley of Black Diamond, Greg Friedman with Junxure Financial Group, and David Lawrence of Global Practice Network who will serve as the moderator of this informative session.

Another topic the conference will explore is **outsourcing – especially as it relates to utilizing a virtual assistant**. The panel will include representatives from Back Office Support Services (BOSS), Envestnet and My Virtual COO. Panelists will discuss how to create a successful outsourced relationship. Other sessions include: **Integrating Salesforce CRM into Custodial Technology Platforms** and **Client Reporting Panel.**

"Based on the popularity of sessions we've run on tablets," says Drucker," we will also have a session entitled **Best Practices in Mobile Devices/Apps** with sponsors that are creating mobile apps for advisors to use with clients and one advisor who has incorporated mobile devices into all of his client interactions."

The conference will be preceded by a day of pre-conference sessions and, as in years past, an Ethics program will be offered, through which attendees earn 2 hours continuing education. Gary A. Morris, CFP®, CLU, CIMC, AEP, AIF®, of Morris Capital Corp., will present **Consequences of Unethical Conduct**. In this post-Madoff era, advisors need methods to restore trust. Morris will focus on the new Code of Ethics and Professional Responsibility of the Certified Financial Planner Board of Standards, Inc. He is known for delivering engaging presentations.

For conference registration, sponsorship applications and additional details, visit www.TechnologyToolsForToday.com. Follow the T3 Community: www.Twitter.com/t3fan. Watch a series of short videos from past T3 Conferences: www.T3Conference.blogspot.com.

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ABOUT THE T3 AND THE TECHNOLOGY TOOLS FOR TODAY™ BRAND

David J. Drucker, MBA, CFP®

Under the banner of "Drucker Knowledge Systems," David J. Drucker, MBA, CFP® provides the benefit of his more than 25 years of experience and research to other members of the financial services industry.

He is the co-author of *The One Thing... You Need to Do As Told by the Financial Advisory Industry's Top Coaches, Consultants and Visionaries* (The Financial Advisor Literary Guild, 2005), *Tools & Techniques of Practice Management* (The National Underwriter Company, 2004) and *Virtual Office Tools for a High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours* (Bloomberg Press, 2002). He is also editor of *T3: The Newsletter*.

Drucker writes on technology and practice management issues for financial advisors as a columnist or contributor to *Financial Advisor* and *Financial Planning* magazines. He recently resigned from monthly columnist duties for www.MorningstarAdvisor.com so that he could spend more time writing white papers, editing the T3 Newsletter and producing the T3 Conference.

Joel P. Bruckenstein, CFP®, CMFC

Freelance magazine writer, book author, virtual office consultant and fee-only financial advisor Joel P. Bruckenstein, CFP®, is the Publisher of *T3: The Newsletter*. He frequently contributes articles to other financial planning publications including *Financial Advisor Magazine and Financial Planning Magazine.* For many years, he was the Senior Technology Editor at www.MorningstarAdvisor.com.

Virtual Office Tools for a High-Margin Practice, Bruckenstein's practice management and technology book co-authored with David Drucker, has garnered universal praise from industry experts. The duo's second book, *Tools and Techniques of Practice Management* which was published by National Underwriter Company in 2004, has also received good reviews.

Bruckenstein's expert opinions have appeared in *The Wall Street Journal, The New York Times, Business Week, The Baltimore Sun, The Washington Post Investment Advisor Magazine, Investment News, Gannett Newspapers*, and the *New York Daily News, Kiplinger's Retirement Report, the Journal of Financial Planning* and other publications.

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