

NEWS



For Immediate Release

CONTACT: David J. Drucker, MBA, CFP®
Drucker Knowledge Systems
(505) 453-5703
dd@daviddrucker.com

Al Martin, Director of Media Relations
Impact Communications, Inc.
(913) 649-5009
almartin@impactcommunications.org

T3 TECHNOLOGY CONFERENCE WELCOMES FINANCIAL PLANNING STUDENTS AND PROFESSORS

Scholarships Provided by Industry Tech Innovators MoneyGuidePro and RedTail CRM

Dallas – February 10, 2012 – Joel Bruckenstein and David Drucker, producers of the 7th Annual “T3” Technology Tools for Today™ Conference today announced the gifting of generous conference “scholarships” for students enrolled in the financial planning curriculum at Texas Tech University and the University of Texas at Dallas.

Technology innovators MoneyGuidePro (www.moneguidepro.com) and Redtail Technology (www.redtailtechnology.com) are providing free conference passes for the students to attend the T3 conference, which is being held this year at the Hilton Anatole in Dallas, Texas, Feb. 16-18. The scholarships offer an exceptional opportunity for at least 25 students from Texas Tech University and the University of Texas at Dallas to attend all educational sessions, network with industry veterans and visit the exhibit hall to review products and services.

“What MoneyGuidePro and Redtail Technologies have done is a huge gift for us,” said Deena B. Katz, CFP®, Associate Professor in the Division of Personal Financial Planning at Texas Tech University in Lubbock, Texas. Katz, who is also a partner at wealth management firm Evensky & Katz, is at Texas Tech in charge of internships, jobs and outreach to the advisor communities. “We are committed to helping our students find the jobs they are best suited for and with the help of Redtail and MoneyGuidePro we are accomplishing our mission.”

Katz continued with an appropriate analogy: “You know it takes an ‘old doctor and a young physician’ to give the best patient care. Well, that’s what is happening in our industry. Many veteran advisors have the client relationships, but do not necessarily have the cutting edge technology and skills. So the idea is to hire the young people who know how to use the technology so advisors can do better business more efficiently.”

INVESTMENT IN THE INDUSTRY

MoneyGuidePro, a Gold sponsor, agrees with Katz. “We really wanted to give to the universities because we believe, for educational reasons, it’s an investment in our industry,” said Chad Blythe, Vice President of Sales for MoneyGuidePro, a collaborative internet-based financial planning software developed by PIEtech. “Plus there are so many learning opportunities at the conference, it’s a perfect environment for advisors to meet the students and see how good a fit they are to bring into their practices.”

Redtail has a similar philosophy and explains their reasons for providing scholarships: “The sponsorship we provide on an annual basis supports the industry, as a whole, in gaining access to great information on practice management and technologies. The scholarship opportunities we are providing for T3 are a way for students to see first-hand what is going on in the real world of financial services,” said Brian MacLaughlin, CEO/CTO of Redtail Technology, a leading provider of web-based Client Relationship Management (CRM), paperless office and email archiving solutions. “One of our core philosophies is education,” he continued. “We want to extend it to the investment community by sponsoring the students and professors who want the opportunity to see all of the technology that is, and will be, available for advisor’s practices.”

Alan Goldfarb CFP®, AIP, an Adjunct Faculty Member at the University of Texas at Dallas, believes that students entering the financial services field “could be part of a firm’s technology committee when it is evaluating and purchasing new technology.” Said Goldfarb, “Most of my students are adult working students. They can help give the advisor more time to spend with clients. Junior people in the firm, instead of spending time doing Excel spreadsheets, can now just push a few buttons, be more productive and do things that are more intellectual.” Goldfarb, who is also the Director of Wealth Advisory Services for Weaver Wealth Management, said that he and three of his students will be attending.

TECH SAVVY FINANCIAL PLANNING STUDENTS

Sponsors MoneyGuidePro and Redtail Technology both agree that this is a good time in the industry for independent advisors and RIAs to build more sophisticated platforms and to take advantage of the students’ technology experience. Said MoneyGuidePro’s Blythe, “These young adults coming out of the FP programs at the universities are exposed to more technology than many of those who have been working for some time in RIA or B/D back offices.”

Why do firms such as MoneyGuidePro and Redtail continue to support T3 year after year? “We see tremendous benefits at T3 to expose our technology to many advisors and custodians,” said Redtail’s MacLaughlin. “We also enjoy the networking, sharing our stories, and seeing all existing and future technology in one place.”

MoneyGuidePro has supported T3 from the initial conference seven years ago. They were attracted to the idea that the conference was specifically focused on technology. “It has grown to be the premier technology conference in our industry. It’s a great place for business for us,” said Blythe. “We love the T3 conference because we can show to the industry who we are and what we do. We also find new integration partners at the conference. It provides opportunities we can’t find anywhere else. This is not done altruistically; it’s an investment into the industry, which is an investment into our firm. Everybody wins!”

“Advisors need to be at the forefront of technology, especially if it means a better client experience. With sponsors like MoneyGuidePro and Redtail Technology providing student scholarships, additional opportunities for growing their practices are available to them. We are thrilled to present some of the truly impressive technology that providers have created for financial advisors,” said Joel Bruckenstein, CFP®, who with his co-producer David Drucker, CFP®, also publish monthly the T3 newsletter, the industry’s only practice management / technology newsletter for financial advisors.

T3 CONFERENCE DETAILS

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.

Since its inception in 2006, the annual Technology Tools for Today Conference (T3) has been the only annual conference devoted exclusively to the technology and practice management needs of independent financial advisors. Co-chaired by the experienced team of Joel Bruckenstein and David Drucker, the T3 conference brings together the nation’s leading technologists, advisors, consultants and technology vendors to discuss technology developments that impact financial advisors.

For conference registration, sponsorship applications and additional details, visit www.TechnologyToolsForToday.com; view also two humorous videos on how technology is changing the industry on the T3 website. 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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