



20 NEW TECHNOLOGIES EVERY RIA NEEDS TO TRY



There are new technologies coming out every day that help us work smarter, but it can be a little overwhelming to choose from the thousands of options out there. You know what, though? Just go for it. Try something new. You might be surprised by how much a single app can change your life. Maybe you'll find a much faster way to do something, or you'll amaze your clients, or you'll no longer need a physical office. Just try one (or more) of our suggestions below. You'll probably end up wondering how you ever lived without it.

“I don't even need an office anymore. With the technology we use, I can get everything done from my laptop or tablet. We have two physical offices, but most of us work on the go or from Regus business centers....Not being tied to any one location has been great.”

- Doug Kinsey, Partner and Chief Investment Officer, Artifex Financial Group, LLC

CLIENT COMMUNICATIONS

Just because you don't have time for face-to-face meetings with all your clients doesn't mean you can't serve them well. There are numerous audio and video conferencing technologies, screen-sharing applications, email marketing services and other solutions that can help you connect to your clients and put smiles on their faces.

Skype - skype.com

Skype is one of the most popular online communication services today. It allows you to connect to other Skype users via voice, video, instant messaging or file sharing — all from any device. One-on-one connections are free, and the premium version (\$9.99/month) allows you to initiate video calls and screen sharing between more than two people.

Fuzebox - fuzebox.com

Fuzebox is a video collaboration service that is similar to Skype, but designed specifically for businesses. The free version enables you to have an HD videoconference with up to 25 participants using any device. You can share your screen, as well as collaborate over media files (want your clients to mark up a graph?). And it's entirely in the cloud, meaning no software downloads.



Join.me - join.me

Join.me is an easy, inexpensive way to share your screen and have a voice conversation with your clients. Once you download the application, you can simply click “share,” and join.me will provide you with a link others can use to view what you’re doing. And join.me has a free version for up to 10 meeting participants, so don’t be fooled by the “free trial” (you can use the basic version for free past the trial period).

MailChimp - mailchimp.com

MailChimp is an online marketing service provider that can help you create attractive email newsletters for your clients. There are many different email marketing solutions out there, but MailChimp is definitely one of the best for small businesses. For starters, it’s free to use if you have fewer than 2,000 subscribers and send less than 12,000 emails per month. MailChimp also has one of the most intuitive, easy-to-use interfaces for managing contacts, designing emails and tracking results. Another affordable alternative you can explore is Constant Contact.

Smarsh - smarsh.com

Smarsh is an electronic solution for archiving communications that’s designed to help you meet SEC requirements. It archives your client emails, attachments, instant messages, social media conversations and even mobile messages — automatically storing them in a secure location for their designated retention period. You can easily search through all these records and export them at any time.



DOCUMENTS & PRESENTATIONS

Microsoft Office isn’t the only way to create documents and presentations today. Modern alternatives allow you to create and edit files directly in the cloud — and from any device.

Google Drive - drive.google.com

Google Drive is an online alternative for Microsoft Office Suite. Essentially, Google Docs is your Word, Google Sheets is your Excel and Google Slides is your PowerPoint. You don’t need to buy or download any software, and you can automatically store your files in the cloud and access them from any device. You can also easily share your documents and invite others to collaborate on them at the same time. Plus, Google Drive easily integrates with thousands of other applications (many of which are mentioned here).



Prezi - prezi.com

Prezi is a cloud-based presentation software and storytelling tool that has gotten very popular recently. It's a bit more visual and intuitive than PowerPoint or Keynote, has a lot of great templates and offers an easy-to-use iPad app. If you'd like to give more presentations to your clients, but find PowerPoint or Keynote to be a hassle, Prezi is definitely worth a look.



Presefy - presefy.com

This is a great free tool that allows people to view your presentation from any device. You simply upload your PowerPoint, Google Slide or PDF presentation, share the link with your audience, and they can view it in real time. You can also control your presentation from any device, so you don't even need to be in the office to give it.

Quickoffice - google.com/drive/apps.html

Do you use Microsoft Office at work, but prefer to travel with an iPhone or iPad? This free Google app lets you create and edit Microsoft Office documents, spreadsheets and presentations from your tablet or smartphone. It also integrates with Google Drive, allowing you to save all your work there and open it from any device.



Evernote - evernote.com

With Evernote, there's no longer a reason to forget anything. It's a new type of note-taking app that you can use to take regular typed notes — or add in photos, audio recordings, videos and even entire web pages. Evernote is available on your computer, tablet or smartphone and syncs all your notes between your devices.

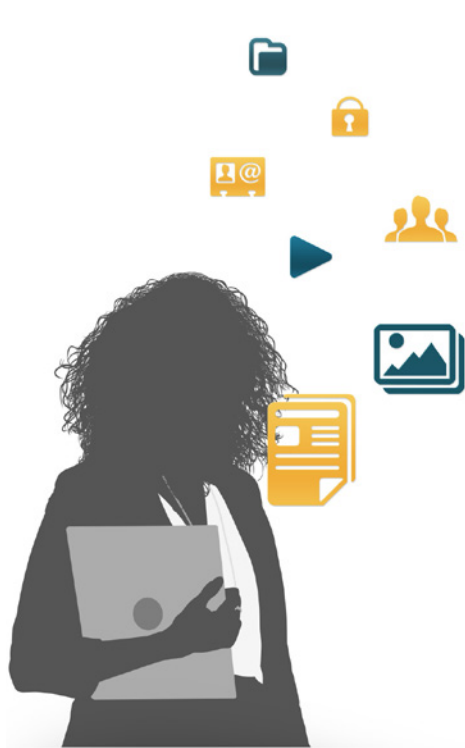
HelloSign, RightSignature - hellosign.com, rightsignature.com

Both of these apps allow you to securely sign, send and receive electronic documents from any device — including those kept in Google Drive, Box, Dropbox and other file-storage sites. They're more affordable than DocuSign, which is geared more for large enterprises, but are just as secure. They're also more innovative in their integrations with other apps (HelloSign, for example, lets you sign documents without leaving your Gmail inbox).



FILE SHARING & REMOTE ACCESS

Microsoft Office isn't the only way to create documents and presentations today. Modern alternatives allow you to create and edit files directly in the cloud — and from any device.



Dropbox - dropbox.com

Dropbox is a free service that lets you store your documents, photos and videos in the cloud and access them from any device. You can also create separate folders to share with clients, coworkers or friends — letting them view and collaborate on files that are often too large to send over email. At its simplest, it's a great way to throw the files you're currently working on into an online folder, and then open them from your tablet or smartphone when you're on the go. The free version gives you 2 GB of space, or you can upgrade to 100, 200 or 500 GB for \$10, \$20 or \$50 per month, respectively.

Box - box.com

Box is essentially a more secure, business version of Dropbox. If you're looking to store sensitive client information in the cloud, Box could be the right solution for you. They pioneered a new level of content management security, with role-based access controls, a 99.9% uptime guarantee, high-grade SSL encryption and more. And the Box mobile app secures your content with file-level encryption, passcodes and auto logout. The free version of Box gives you 10 GB of space, the Starter version gives you 100 GB (\$5/user/month), the Business version 1,000 GB (\$15/user/month), and the Enterprise version is unlimited (\$35/user/month).

CUSTOMER RELATIONSHIP MANAGEMENT

Customer relationship management (CRM) technologies essentially help you manage your clients and prospects in the cloud, using any device. You can use a CRM solution to store client information, communicate with clients and prospects, keep track of all past interactions, run reports and much more.

Redtail CRM, Salesforce, Solve360 - redtailtechnology.com, salesforce.com, norada.com

There are numerous CRM tools out there and each one has its own advantages. Here are three worth exploring:

- Redtail CRM is uniquely designed for financial professionals.
- Salesforce is considered a world leader in CRM and can pretty much do anything — but you also pay for it (the biggest cost comes from Salesforce charging per user rather than for the account). And because it's a powerful tool with so many capabilities, it can also take more time and effort to figure out how to set up everything correctly.
- Solve360 is a very well-liked CRM solution for small businesses that integrates easily with Google Apps and doesn't charge much per additional user.

OFFICE MANAGEMENT

Having your own office can be nice, but it can also be a hassle. It's a good thing there are tools out there to make it easier.

Ruby Receptionists - callruby.com

Ruby Receptionists is a virtual receptionist service that answers your phone with “the perfect mix of friendliness, charm, can-do attitude, and professionalism.” You can forward your existing number or publish a Ruby toll-free number, and a fleet of friendly receptionists in Portland will cheerfully answer your calls with a personalized greeting Monday–Friday 5am–6pm PST. You can instruct them to provide a description of your services, distinguish between types of calls, take messages, route calls or call you personally to see if you'd like the call transferred.

PORTFOLIO & TRADING TOOLS

At the end of the day, these are the most important tools an RIA can have. The right portfolio management and trading technology can make you more efficient, cut costs and allow you to better serve your clients.



TCAdvisor - trustamerica.com

TCAdvisor is a model-based trading and rebalancing platform from Trust Company of America, and it's one of the most advanced technologies available in the market. It combines a variety of different services in one platform, including trading, custody, rebalancing, reporting, billing and many more.

Liberty from Trust Company of America - trustamerica.com

Liberty is the first fully-mobile portfolio monitoring platform in the industry. With Liberty, you can give your clients and reps the ultimate freedom: real-time access to account information and reports, anywhere they need them.

IT'S A BRAVE NEW WORLD

Clear your desk and get rid of all that paper. Put all your files in the cloud and access them from your tablet or smartphone — wherever you are. Get documents signed electronically, keep track of all your client interactions online, build presentations on your iPad and present them using your smartphone. And integrate it all so that you don't have to switch between programs.

Don't be afraid to try new things. The technologies we suggested are just a drop in the bucket. Browse through the Chrome Web Store, the Google Play Store, or the Apple App Store and see what else you might find. And let us know if you discover something new worth sharing.

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