
Advisor Software, Inc., partners with Redtail Technology

By Editor Test Mon, Nov 19, 2012

Developed for advisors looking for an alternative to the comprehensive, book-length financial plan, goalgamiPro is a web-based platform that uses the notion of the household balance sheet to enable advisors to create a plan in eight minutes.

Advisor Software Inc., a provider of wealth management solutions for the financial advisor market, has agreed to provide its planning tools to financial professionals who use Redtail Technology Inc. client relationship management (CRM) systems. The partnership will integrate ASI's direct-to-advisor product, goalgamiPro, with Redtail's CRM suite.

Developed for advisors looking for an alternative to the comprehensive, book-length financial plan, goalgamiPro is a web-based platform that uses the notion of the household balance sheet to enable advisors to create a plan in eight minutes, and generate a series of client-focused one-page reports.

In addition to improving advisor efficiency by reducing planning time, the goalgamiPro quick planning solution has also been designed to:

- Generate leads: goalgamiPro comes with a household balance sheet PowerPoint deck for lunch or dinner seminars. goalgamiPro is then used to prepare a report for a free 30-minute household balance sheet assessment.
- Strengthen client relationships: goalgamiPro also comes with Collaboration Connect, a client goal planning website enabled by the advisor and integrated with goalgamiPro.

"As the technology for the financial services industry becomes increasingly CRM-centric, individual advisors are seeking planning tools that can easily be launched when time does not allow for completing a full financial planning analysis," said Neal Ringquist, President and Chief Operating Officer of ASI. "The integration of goalgamiPro with Redtail's very popular CRM platform gives advisors an optimal tool to make quick assessments of their clients' goal plans."

© 2012 RIJ Publishing LLC. All rights reserved.