
Three advisor technology leaders to collaborate on retirement software

By Editorial Staff *Thu, Jan 31, 2019*

Former eMoney founder and CEO Edmond Walters will lead Apprise Labs, as the venture is called, with collaboration from Investnet and PIEtech.

Investnet, PIEtech, and former eMoney CEO Edmond Walters have started Apprise Labs to build software that addresses “estate planning, lifetime cash flow and client retirement needs,” according to a release this week. Walters will lead Apprise.

The software will add detailed short-term cash flow and tax information to Investnet Logix and MoneyGuide. The add-ons will allow advisors to collaborate with clients through an interactive user interface to plan for their family’s legacy needs, the release said.

Clients using the MoneyGuide platform or the Logix tool will have access to more advanced and interactive estate planning options later in 2019.

“These new capabilities will use visual, interactive technology to help clients manage important financial decisions pertaining to home sales, retirement investments and assets, inheritance gifts, endowment contributions and more,” said Jud Bergman, chairman and CEO of Investnet, in a statement.

Embedded and integrated add-on features that will be available to users for each platform include:

Estate Planning: Client assets are displayed and broken down in one portfolio dashboard.

Cash Flow: Advisors can compartmentalize cash flow by strategy or focus area, such as retirement savings, inheritance gifts, or endowment contributions.

Content Updates: Information and content strategy from financial experts.

Snapshot: All expenses are tracked and displayed for the advisor.

Advisors at the T3 Advisor Conference this week could see a demonstration of the new software. Additional information about Apprise will be released at the Investnet Advisor Summit in Austin, Texas from May 1-3, 2019.

© 2019 RIJ Publishing LLC. All rights reserved.