

Software Utilization	FPA Respondents	All Respondents
CRM	97.46%	96.89%
Financial Planning	89.57%	82.18%
Portfolio Management	85.93%	63.87%
Trading/Rebalancing	58.61%	38.69%
Investment Data/Analytics	81.88%	46.52%
Economic Analysis	60.12%	37.29%
Risk Tolerance	40.43%	31.50%
Document Management	76.18%	47.19%
Document Processing	65.20%	58.95%
Retirement Dist. Planning	31.78%	10.72%
Estate Planning	13.93%	10.95%
Tax Planning	49.28%	29.77%
Social Security Analysis	57.65%	48.14%
College Planning	57.17%	43.52%
All-in-One Programs	27.39%	20.78%
Account Aggregation	53.88%	43.72%
Cybersecurity	31.85%	22.45%
Digital Marketing	32.74%	28.97%