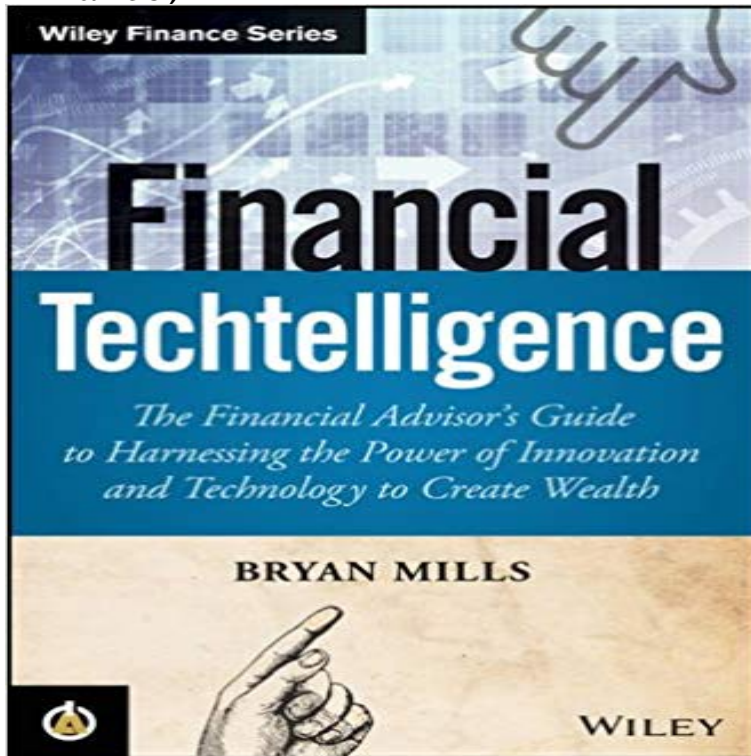


Financial Techtelligence: The Financial Advisors Guide to Harnessing the Power of Innovation and Technology to Create Wealth (Wiley Finance)



Raise the bar for meaningful customer connections, time efficiency, and exceptional performance accuracy with effective use of technology. Financial Techtelligence is the financial advisors guide to practice enhancement through the strategic use of technology. With over 20 years of experience as a financial consultant to private investors, author Bryan Mills has steered his expertise toward helping other financial professionals develop a general understanding of how technology will create a more personal experience with useful time-saving and practice-improving strategies. In this book, he demonstrates how technology can help your practice thrive and offers a clear blueprint for effective implementation. You'll delve into the four benchmarks of a successful technology strategy: Audience, Budget, Due Diligence, and Expectations and learn how to appropriately define each step to best suit your specific practice. Technology continues to help stockbrokers, financial advisors, insurance agents, and other financial services professionals raise the bar for performance, and it's time for you to claim these advantages for your own practice. Rapid technological innovation has brought about game-changing tools that harness the power of cost-effective trends in marketing and practice management. This book shows you how to choose the tools that are best for your practice, and leverage their capabilities to improve the customer experience. Identify and target your customer base. Develop a budget for reaching your goals. Understand your strategy's risks and rewards. Set realistic expectations without aiming too low. Every financial services professional is constantly on the lookout for that one great idea that will rocket their practice to the top. Better practice management, more streamlined operations, higher levels of client service, and of course, optimal

outcomes are the cornerstones of exceptional financial service firms. Financial Techtelligence shows you how technology can get you there, and how to implement a strategy customized for your practice.

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