











# Technology Menu

## Required Technology

	DESCRIPTION	PRICING
	Document Management & File Sharing	✓
	Custodian	✓
	Client Onboarding & Account Maintenance	✓
	Portfolio Accounting & Client Portal	✓
	CRM	✓

## Optional Technology

	DESCRIPTION	PRICING
	Financial Planning Fees	✓
	Financial Planning	✓ (*Choose one)
	Financial Planning Workflows	✓
	Tax Planning	✓
	401(k) Data Aggregator	*Advisor Pays Pontera BPS Fee