xypn sapphireTechnology Menu

| | | PRICING |
|-------------------|--|--------------|
| box | Document Management & File Sharing | \checkmark |
| Charles Schwab | Custodian | \checkmark |
| Гіпрасе | Client Onboarding & Account Maintenance | \checkmark |
| Advisor tech | Portfolio Accounting & Client Portal | \checkmark |
| Wealthbox | CRM | \checkmark |

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| Optional Technology | | | | |
|---------------------------------|---------------------------------|-------------------------------------|--|--|
| | DESCRIPTION | PRICING | | |
| ÂP AdvicePay | Financial Planning Fees | \checkmark | | |
| Elements eMoney RightCapital √ | Financial Planning | ✓ (*Choose one) | | |
| fpPATHFINDER | Financial Planning Workflows | \checkmark | | |
| holisti plan | Tax Planning | \checkmark | | |
| Pontera [®] | 401(k) Data Aggregator | *Advisor Pays Pontera BPS Fee | | |