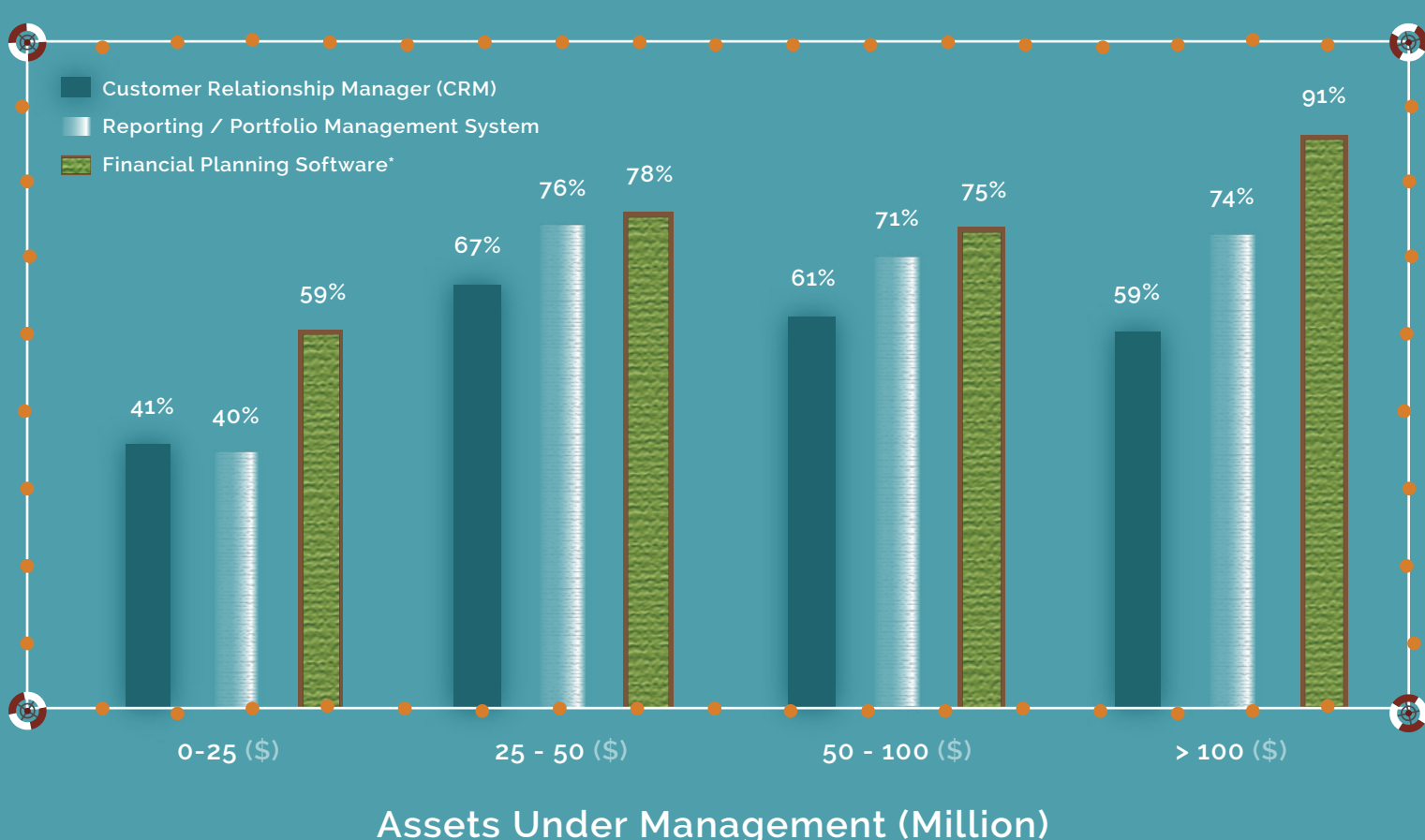


# Today's RIA Technology Landscape

2015 Edition as of December 2015



## 2015 Technology Adoption by AUM\*



\* Only includes firms that offer financial planning services

Warning! Outlook is not a CRM Software.

## How does technology adoption impact an RIA firm?\*

Systems Used:	1	2	3+
AUM Growth:	19%	27%	40%
Advisory Fee:	1.11%	1.05%	1.00%

## Technology is the future for RIAs. Does your firm know where it's going?

Most firms don't need and can't afford a dedicated Chief Operations or Chief Technology Officer. However, all firms do need an integrated technology system in order to grow efficiently.



RIA in a Box  
Compliance Services

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\*Source: RIA In a Box 2015 RIA Technology and Options Survey.