Advicer.bio

Advicer Tech Landscape

We fixed the map.

42 tools

Only the tools I recommend, not a thousand logos.

November 2026

FINANCIAL PLANNING

FINANCIAL PLANNING

- Hazel
- RightCapital ★ 8.5
- Kerdora
- Libretto ★ 8.5

RETIREMENT INCOME

- Income Lab ★ 8.3

HEALTH PLANNING

- Move Health ★ 8.4

TAX PLANNING

- Hazel
- Holistiplan ★ 8.7

ESTATE PLANNING

- EncorEstate ★ 8.1

CASH FLOW & AGGREGATION

- Monarch ★ 7.9

LEGACY

- Trusty
- Total Family

INVESTMENT MANAGEMENT

CUSTODIAN

- Altruist ★ 8.5

PORTFOLIO MANAGEMENT

- Seeds

INVESTMENT DATA

- Investipal ★ 8.0
- Pack Analytics

RISK TOLERANCE

- Investipal ★ 8.0
- RightCapital ★ 8.5
- Tolerisk ★ 8.9
- Pack Analytics

BUSINESS DEVELOPMENT

PROSPECTING

- Kanso
- InfluenceLab
- Wealthfeed ★ 6.4

SEMINARS & LEAD GEN

- Nexruto

SOCIAL PUBLISHING

- DemandBird

NEWSLETTERS

- Resend
- Substack

VIDEO

- Cue Studio
- Riverside

WEBSITE

- Claude Code
- Aryze Design

COMMUNITY

- Skool

PRODUCTIVITY

EMAIL & OFFICE

- Google Workspace ★ 8.6
- Microsoft 365

EMAIL

- Superhuman

CLIENT ENGAGEMENT

AI MEETING ASSISTANT

- Hazel
- Granola

ADVICE ENGAGEMENT

- fpPathfinder ★ 8.2

SCHEDULING

- Cal.com

CLIENT TEXTING

- CurrentClient ★ 8.8

VIDEO MEETINGS

- Zoom ★ 7.8

OPERATIONS

AI ALL-IN-ONE

- HolisticOS

CRM

- Slant
- Hazel
- Zero

COMPLIANCE

- Greenboard ★ 8.4

BUSINESS METRICS

- AdvisorEconomics

ACCOUNTING

- Found

Joe Moss's picks · ★ Advisor satisfaction out of 10 (T3/Inside Information and Kitces surveys from the last two years, averaged)

Full landscape: **advicer.bio/resources/advisortech-landscape**