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# Technology Update

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**LaVista**  
LICENSEE SOLUTIONS

**AAP**  
Licensee Solutions

# Adviserlogic LaVista Offer

<https://vimeo.com/952976797/8423b45c9c?share=copy>



## Empowering Investor Success



**Workflow**

XPLAN, Adviser Logic, WorkSorted, Monday, Trello, Teams, ZOHO, Slack, Hivers

**Practice Management**

**DIGITAL SIGNATURES**

Docusign, Adobe, Annature, HelloSign, PandaDocs

**ONLINE CALENDAR BOOKINGS**

Bookings (Microsoft), Calendly, Other

**DIGITAL FACT FIND/DATA GATHERING**

Advice Revolution, XPLAN (Client portal), MyProsperity, Adviser Forms, Xeppo, Moneysoft, Other

**File Note Transcription**

CoPilot, FileNote.Ai, Fintalkr. Otter, MeetGeek, Other

**Remuneration System**

CommPay, PayLogic, Revex, Worksorted, Stripe, Ezidebit

**Financial Planning - SOA/ROA**

XPLAN, Adviser Logic, Plutosoft, Intelliflo, GBST Advice Intelligence, Midwinter, Fin365, Asendium, PlatformPlus, Other

**YOUR TECH STACK**

One Way Integration → Write or circle the systems you use in each section and draw connectors to between systems that talk to each other.   
 ← Two Way Integration

**Cloud Services**

Office 365/ Google Workspace/ Other

**CRM**

XPLAN, Adviser Logic, WorkSorted, Salesforce, ZOHO, Intelliflo, Dash, Fin365, Platform Plus, Other

**Client Portal**

XPLAN, SharePoint, Myprosperity, Advice Revolution, Qwil, Other

**Cyber and Data Security**

**Managed by**

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 Are you confident that you have sufficient measures in place? **YES / NO**

What are you paying for that you aren't using all the functionality?

**Pain Points**

**Accounting**

Xero, QuickBooks, MYOB, Sage, FreshBooks, Zoho Books, Other

**AI**

ChatGPT, CoPilot, Bard, Bing, Scribe

**Client Engagement/Modelling**

Voyant, Optimo, IFF, LivePresso, RetireMap, Astute Wheel, Prospera, Lumiant, Oxford Risk

**Data Aggregator/Management Reporting**

Xeppo, CDM Solutions (Insurance), HUBConnect, Power BI, Excel

**Website/Marketing**

WordPress, SquareSpace, Umbraco, WIX, HubSpot, MailChimp, Canva, Social Champ

**Other tools**

Morningstar, Lonsec, Zenith, FE fundinfo, CapCut, Loom, Front App

# THANK YOU

Questions

