

The Wealth Management Performance Reporting Technology Landscape, *Ranked*

User Adoption

Some performance reporting tools offer stronger UI/UX experiences and are easier for advisors to learn and use well.



Customization vs. Control

Some tools can be highly customized to fit a firm's unique needs while others have less options for customization, but more control.



Innovation vs. Stagnation

Some performance reporting tools continue to innovate and add features that firms need while others are built and left alone.



Client Experience

What kind of experience advisors can expect to deliver to their clients.

