

# Technology & Tools

POWERING YOUR BUSINESS

## Why Founders' Enterprise Management Suite?



### Industry-Leading Tools

Our technology offering brings together the best technologies, tools, and standards the industry has to offer and work together to deliver a streamlined platform that is intelligent and efficient.



### Built for Your Business

The holistic package gives you greater control over the productivity, scalability, and efficiency of your business - allowing you to better serve your clients.



### Flexible and Robust

Whether you want to use the entire tech stack or BYOT (bring your own tool) - we work with you to build and maintain the best solutions for your business.



### Adoption and Education Support

You have access to personalized educational and training resources. We guide you through adopting, integrating, and ultimately optimizing your technology usage.



### Integration is the Standard

As we continuously vet the industry landscape for new offerings, we partner with providers to ensure the product is delivered in a way that supports your existing tech infrastructure - making it easier for you to adopt new technologies.

## Your business needs...

- ▶ Client Experience & Management
- ▶ Compliance & Operations
- ▶ Research & Education
- ▶ Marketing
- ▶ Business Analytics & Development

## ...a flexible and robust tech stack.

Precise  FP

SmartOffice

eMoney  
Advisor

riskalyze

 REDTAIL 

 Office 365

MORNINGSTAR

DocuSign

NETX360

ASER APP  
SOFTWARE

 smash

CCH® AnswerConnect

*“Since day one, I recognized the big picture potential with this approach to technology. Not only has it allowed me to streamline my business, but the support has improved my firm’s client management operations – making it easier for us to focus on the relationship and growing my business.”*

Dan Kuderer  
Kuderer Financial  
Member Partner since 2015

## INNOVATIVE PLATFORMS, POWERED BY PARTNERSHIP.

Learn how the **Enterprise Management Suite** can help you elevate your business today.  
[foundersfinancial.com](http://foundersfinancial.com)

Founders Financial is an interdependent RIA-B/D. Member FINRA/SIPC and Registered Investment Advisor.