

PER STIRLING

Industry Leading Technology

At Per Stirling, we understand the crucial role that technology plays in driving the success of your advisory practice.

That's why we offer a comprehensive tech stack tailored to meet the unique needs of today's wealth managers. Our cutting-edge tools are designed to optimize client relationships, analyze performance, and stay a step ahead of compliance requirements.

Per Stirling is pleased to make our Tech Stack available at well below retail cost for a quarterly fee of only \$500 which includes the following suite of tools:

- Smarsh compliance archiving & encryption
- Laserfiche document management
- Adobe eSign
- Orion Advisor Solutions
- Orion Planning
- ByAllAccounts aggregation
- Cybersecurity protection
- IT support package - remote desktop service
- Fidelity Wealthscape & Schwab Advisor Center
- Microsoft 365
- 8x8 Virtual Office phone & directory
- Wealthbox CRM
- Rollover Analyzer
- CellTrust compliance approved texting



Powerful tools work with you to provide the best service possible to your clients while maintaining the efficiencies needed to handle the day-to-day workload and the compliance requirements of today's regulators.

Per Stirling is pleased to accommodate additional technology at the Advisor's discretion and cost including, as examples:

- Additional IT Support
- Orion Plaid
- Arbor Research
- DST Fanmail Integration
- AI Insights
- Y-Charts Software
- Morningstar Direct
- Morningstar Advisor Workstation
- Continuing Education Modules
- eMoney
- MoneyGuidePro

"The importance of an efficient, supportive technology stack in today's Wealth Management practices cannot be overstated."

— Robert S. Phipps



PER STIRLING

Performance • Perspective • Per Stirling

Stay connected with us!



www.perstirling.com



info@perstirling.com



512.628.2300



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