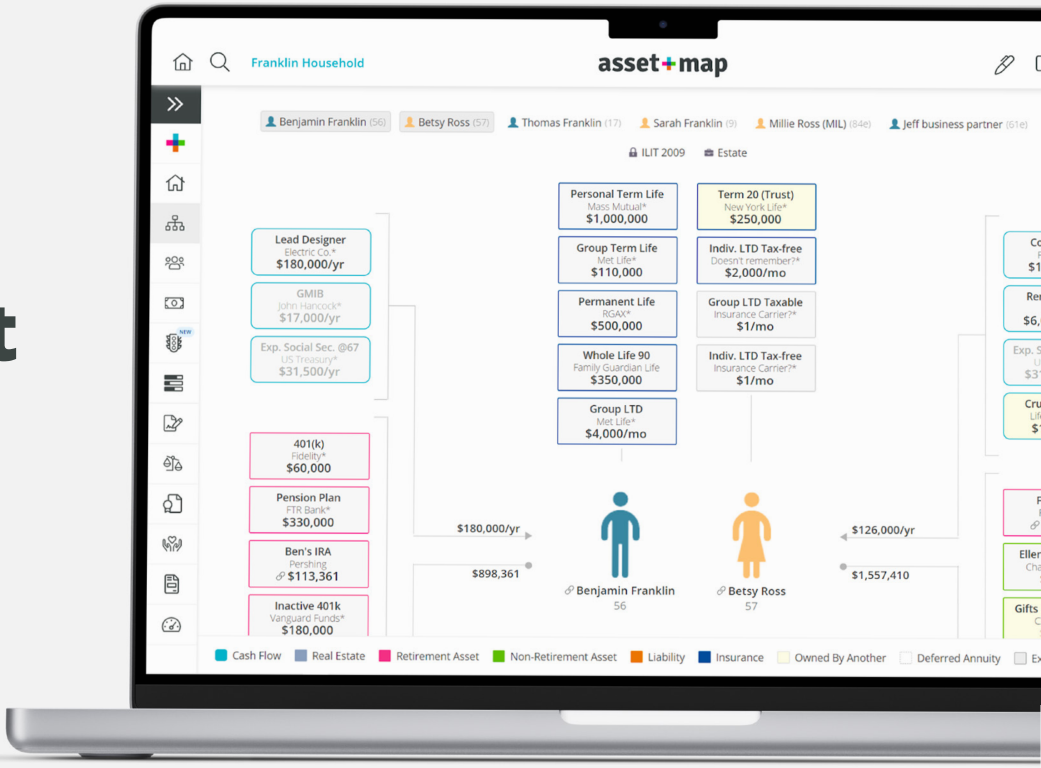
asset+map
Advice Starts Here

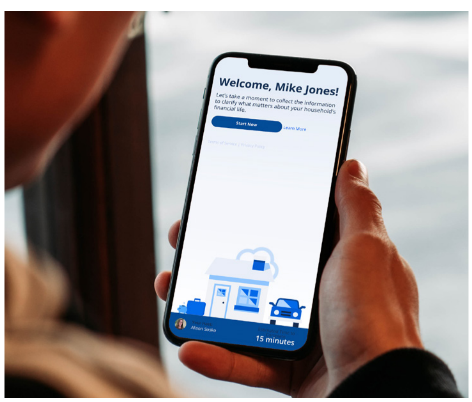
Accelerate Advice Engagement

Advisors have used Asset-Map to help guide over **1.25 million** people and mapped over **$1.5 trillion** in financial instruments.

What can Asset-Map reveal about your clients to facilitate a more meaningful advice conversation?

Set up a demo today to learn more.





What's an Asset-Map Report and what can it do for my clients?

An Asset-Map Report visually organizes all of a household's finances in a clear graphical layout, allowing Advisors to apply their professional insight in real time.

Can I easily collect data from my clients?

Yes! Our direct-to-consumer Discovery interview streamlines the collection of high-level household data and client conversions, which then pre-builds the Asset-Map report.

Can I track my client's progress over time?

The answer is YES! Define a household's most important financial priorities and track their progress with interactive Target-Maps®.

Additional Asset-Map Features:

As outlined above, the Asset-Map Platform is truly unique in its Asset-Map household visualization, Discovery data collection tool, and Target-Map one-page goal planning. Additional features include Signals, our proprietary algorithm feedback on financial event risks, Stencil peer overlays, as well as data integrations with a variety of partners.

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What Advisors Say

Molly Ward, CFP®

"The best way to measure the value of technology is to understand what your firm would be like without it.

Asset-Map is like coffee for me and my clients; it's an essential part of every day."

Susan Bruno, CPA/PFS, CFP®

"As a seasoned CPA financial planner, I have seen many software packages that are unnecessarily complicated for both the practitioner to use and the client to understand.

When I found Asset-Map, I found a simple, cost-effective way to present a client's financial picture. It's easy to understand, which allows for more meaningful planning discussions and makes it simple to follow up with the stroke of a button offering a valuable client deliverable.

My clients love it, and I use it for my own financial check-up quarterly too!"

Ross A. Riskin, DBA, CPA/PFS, CCFC

"As many tax professionals get wrapped up in the compliance side of the business and focus on accounting for events that have happened in the past – what better way to demonstrate to clients that we are focused on helping them plan for their future as well than providing them with a visual map – an asset map – that helps them understand where they've been, where they are, and where they are going."

G2

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Financial Wellness Tools

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2019, 2020, 2021, 2022 Awards
Winner Specialized Planning (2)
Winner Diversity Equity & Inclusion
Finalist Financial Planning
Finalist Tech Thought Leadership
Finalist CEO of the Year 2022

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#1 Highest Advisor-Rated
Adopted Mind Mapping Tools

Ready to Get Started?

Set up a demo today to learn how Asset-Map can help your clients see their holistic financial picture to make better financial decisions.

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