

# EVO Wealth Consulting Launches Wealth Technology Solution Guide with 22 Industry Leaders

*EVO Wealth Consulting helps growth-focused wealth managers navigate the expanding landscape of wealth technology.*

NEW HOPE, PA, UNITED STATES, August 6, 2024 /EINPresswire.com/ -- [EVO Wealth Consulting](https://www.einpresswire.com/) (EVO), is proud to introduce the Wealth Technology Solution Guide, created in partnership with 22 leading wealth technology providers. This initiative aims to help financial advisors, Registered Investment Advisory (RIA) firms, and broker-dealers navigate the expanding landscape of wealth technology.

EVO's new guide offers clear, concise educational content, explaining the functions and implementation of various solutions within advisory firms. The content also addresses the challenges of adopting new technologies and integrating them into existing processes.

The 22 featured firms, selected for their innovative solutions and commitment to client service, span the entire wealth management technology spectrum. These firms provide cutting-edge solutions, continuously invest in their offerings, and are dedicated to exceptional client support.

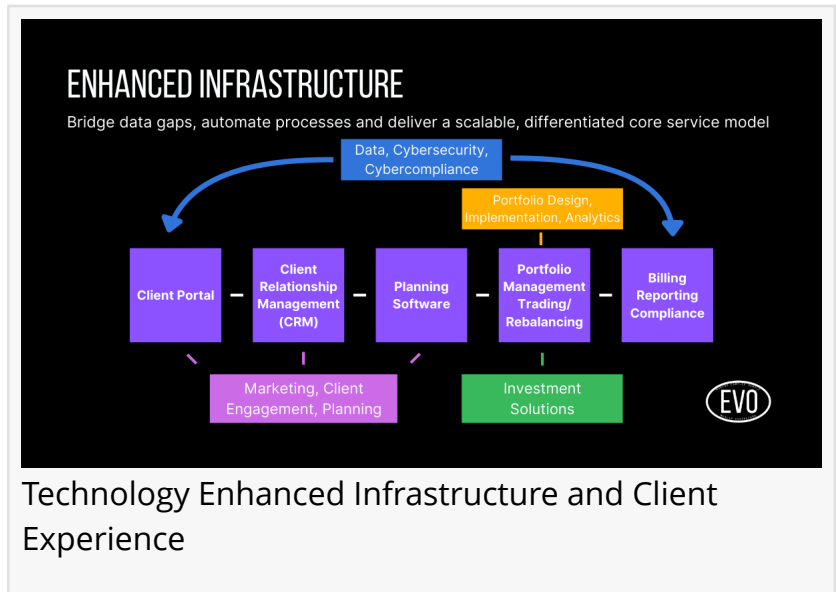
Mike Casciano, Founder and President of EVO, has extensive experience from his roles at BlackRock and Principal Asset Management, where he combined asset management products with wealth technology and portfolio analytics. "The demand for comprehensive, customized technology education was clear," Casciano said. "EVO was founded to meet this need."



EVO Has Partnered with 22 Leading Wealth Technology Solutions Across the Technology Stack

EVO's innovative content covers four key categories:

1. Data and Cyber: Buckler, FCI, Dispatch, JIFFY.ai
2. Marketing, Client Engagement, Planning: Fynancial, Asset-Map, Wealth Management GPT, VRGL, FP Alpha, Vanilla, Jump
3. Portfolio Design, Implementation, Analysis: Nebo Wealth, Smartleaf AM, Advyzo IM, AllocateRite, Kwanti, Jacobi
4. Investment Solutions: VettaFi, Syntax, Proteus, IMTC, Halo Investing



EVO's website offers wealth management leaders operational and technical educational content through short videos and articles. Soon, the site will include a portal for curated access to wealth technology demo videos.

Learn more about EVO, the partner firms, and the Wealth Technology Solution Guide by visiting [www.evo-wealth.com](http://www.evo-wealth.com).

#### About EVO

EVO Wealth Consulting, LLC was founded in September 2023 to fill the unmet need of holistic technology and client service process consulting for wealth managers with a focus on \$1B+ RIAs. EVO combines two decades of broad asset and wealth manager experience with thousands of advisor engagements. EVO conducts continuous due diligence across the entire technology stack to identify challenges, emerging technologies, best practices, and opportunities for efficiency. The result is a true open architecture consulting relationship that adapts to a firm's needs through time.

#### Data and Cyber:

Buckler - <https://buckler.app/>

FCI - <https://fcicyber.com/>

Dispatch - <https://www.dispatch.io/>

JIFFY.ai - <https://jiffy.ai/>

#### Marketing, Client Engagement, Planning:

Fynancial - <https://fynancial.com/>

Asset-Map - <https://www.asset-map.com/>

Wealth Management GPT - <https://wealthmanagementgpt.com/>

VRGL - <https://www.vrglwealth.com/>

FP Alpha - <https://fpalpha.com/>

Vanilla - <https://www.justvanilla.com/>

Jump - <https://jumpapp.com/>

Portfolio Design, Implementation, Analysis:

Nebo Wealth - <https://www.nebowealth.com/>

Smartleaf AM - <https://www.smartleafam.com/>

Advyzon IM - <https://www.advyzon.com/main/index.html>

AllocateRite - <https://www.allocaterite.com/>

Kwanti - <https://kwanti.com/>

Jacobi - <https://www.jacobistrategies.com/>

Investment Solutions:

VettaFi - <https://vettafi.com/>

Syntax - <https://www.syntaxdata.com/>

Proteus - <https://www.proteuscapital.us/>

IMTC - <https://imtc.com/>

Halo Investing - <https://haloinvesting.com/>

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