

Buckler is Included in EVO Wealth Consulting's Launch of a Wealth Technology Solution Guide with 22 Industry Leaders

Buckler is pleased to announce inclusion in EVO Wealth Consulting's Wealth Technology Solution Guide.



Buckler

Cyber Program Management Solutions

NEWARK, DE, UNITED STATES, August 6, 2024 /EINPresswire.com/ -- [Buckler](#) is

pleased to announce inclusion in [EVO](#) Wealth Consulting's Wealth Technology Solution Guide, created in partnership with 22 leading wealth technology providers. This initiative aims to help financial advisors, RIA firms, and broker-dealers navigate the expanding landscape of wealth technology.



Buckler is proud to be a part of the list for cybersecurity compliance and cyber program management."

Scott Smith, Buckler CEO

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's innovative content covers four key categories:

- Data and Cyber: Buckler, FCI, Dispatch, JIFFY.ai
- Marketing, Client Engagement, Planning: Fynancial, Asset-Map, Wealth Management GPT, VRGL, FP Alpha, Vanilla, Jump
- Portfolio Design, Implementation, Analysis: Nebo Wealth, Smartleaf AM, Advyzon IM, AllocateRite, Kwanti, Jacobi

- Investment Solutions: VettaFi, Syntax, Proteus, IMTC, Halo Investing

Buckler's CEO, Scott Smith adds, "Michael and the EVO team have done their diligence in putting together a great tech stack list to guide advisors and firms as they navigate putting the best solutions in place operationally. Buckler is proud to be a part of the list for cybersecurity compliance and cyber program management."

About Buckler

Buckler provides a Cyber Compliance Management solution to Financial Services organizations, ensuring robust compliance with SEC, FINRA, NAIC, NYDFS, and other regulations. Continuously updated to reflect regulatory changes, Buckler assists firms in achieving and surpassing regulatory requirements while enhancing security programs. Our platform covers critical areas such as risk and governance, business continuity planning, security incident response, information security policy enforcement, and vendor risk management. With predefined, customizable policies matched across applicable regulations, Buckler streamlines compliance processes. <https://buckler.app/>

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. <https://evo-wealth.com/>

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