

# Financial Planning Software Market Expected to Reach \$16.9 Billion by 2031 | Size , Share, Growth

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NEW CASTLE, DE, UNITED STATES, August 11, 2025 /EINPresswire.com/ -- According to a new report published by Allied Market Research, titled, "[Financial Planning Software Market](https://www.alliedmarketresearch.com/financial-planning-software-market)," The financial planning software market size was valued at \$3.7 billion in 2021, and is estimated to reach \$16.9 billion by 2031, growing at a CAGR of 16.6% from 2022 to 2031.



Financial Planning Software  
Market: Global Opportunity  
Analysis and Industry  
Forecast, 2021-2031"

AMR

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Surge in awareness about financial planning software among users and increased usage of FinTech are the key factors that boost the global financial planning software market growth. However, data breaches and security concerns and lack of ability to customize financial planning software restrict the growth of the financial planning software market. Conversely, development of advanced technology in the financial sector and increase in number of high net worth individuals are expected to create huge opportunity for the market in the coming years.

On the basis of application, the financial advice and management segment is expected to grow at the fastest rate during the forecast period. This is attributed to the fact that financial advisor software solutions are designed by financial advisers for financial planners, and developed specifically to improve workflow efficiency, increase productivity and enhance client relationships. In addition, the web-based modular design with role-based entitlements allows custom configurations to support any advisor preference.

By region, the global financial planning software market trends was dominated by North America in 2021, and is expected to maintain this trend during the forecast period. Attributed factors such as increased internet dependence, increased usage of mobile apps, increased acceptance of personal finance software, and the availability of open-source solutions are driving the growth of the financial planning software in this region. However, Asia-Pacific is expected to grow at the fastest CAGR during the forecast period, due to increasing demand for financial planning

software from SMEs is projected to drive market expansion as regulatory requirements become more stringent. As the number of SMEs in growing economies such as India and China increases, so does the demand for financial planning software. Furthermore, as these businesses implement more IT infrastructure, demand for digital services to better their business skills is expected to witness growth.

The financial planning software market has been positively impacted by the COVID-19 outbreak. This is attributed to the fact that consumer trends toward financial management software are changing and key players in the market are adopting technologies such as artificial intelligence-based solutions for managing funds for corporates. Moreover, with the emergence of financial planning software, consumers have become more comfortable with sharing their personal data with these software for managing their finances.

Key findings of the study : <https://www.alliedmarketresearch.com/purchase-enquiry/A16422>

By component, the solution segment led the financial planning software market analysis in terms of revenue in 2021.

By application, the financial advice and management segment accounted for the highest financial planning software market share in 2021.

By region, North America generated the highest revenue in 2021.

### Enquire Before Buying

The key players profiled in the financial planning software market analysis are Advicent Solutions, eMoney Advisor, LLC, Moneytree Software, MoneyGuide, Inc., Miles Software, Orion Advisor Technology, Personal Capital Corporation, Quicken Inc., RightCapital Inc., and SAP. These players have adopted various strategies to increase their market penetration and strengthen their position in the financial planning software industry.

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