Technology Overview

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Technology Stack Overview

When you become part of Financial Gravity, you gain access to a powerful suite of tools, technology, and systems designed to help you succeed. From day one, you'll be equipped with industry-leading software and proven processes that streamline your work, enhance productivity, and support your professional growth. These resources are carefully curated to ensure you have everything you need to serve clients effectively and operate with confidence

Below is an overview of the software and systems available to you as a member of the Financial Gravity team:

OneLogin

Financial Gravity uses OneLogin, as a Single Sign-on solution that delivers a one-time password through push notifications, which makes the authentication process simple and easy. Through this application Family Office Directors have the ability to access all tools, softwares, and applications involved in their Family Office Business through one single-sign-on.

FG CRM (Zoho)

Financial Gravity uses Client Relationship Management (CRM) software which provides a centralized location for our Family Office Directors and the FG team members to manage and track workflow and tasks for each Family Office Client. Our Client Success Team manages all client relationships and ongoing service within the software as well. In addition, our CRM functions as our data storage for client documents for books and records.

Financial Gravity Client Portal (Addepar)

Financial Gravity's Advisor/Client Portal delivers portfolio management, performance reporting, and billing on our managed accounts. In addition, a client can include outside accounts to have a total view of your financial picture. The portal provides easy-to-navigate dashboards with quick access to client-specific data. Family Office Directors are able to view and analyze multiple accounts in real time.

RightCapital

Financial Gravity's offers our financial planning services to our Family Office Directors' clients. The Family Office Plan is a comprehensive picture of clients' current finances, financial goals and any strategies recommended to achieve those goals. Our Family Plan is inclusive and coordinates all client details regarding their cash flow, expenses, investment assets, debts, insurances, estate, and tax elements of their financial lives.

iRebal

Financial Gravity leverages iRebal to streamline and automate the trading process across client portfolios. By using advanced rebalancing technology, we can efficiently maintain target allocations, reduce errors, and ensure consistency in investment strategies. This allows our advisors to spend less time on manual trades and more time focusing on delivering personalized client service.

Google Workspace

Financial Gravity provides our licensed Family Office Directors with access to Google Workspace. Google Workspace provides a suite of communication and collaboration applications to our Family Office Directors that makes working together a whole lot easier.

Calendly

Financial Gravity uses Calendly to simplify and streamline scheduling for both clients and team members. With customizable meeting links, clients can easily book time that works for them without the back-and-forth of emails or calls. This ensures a smoother experience, saves valuable time, and helps our advisors stay focused on delivering personalized service.

Real Risk Meter (TM)

FGAM's proprietary Real Risk Meter tool helps Family Office Directors identify, quantify, and better align clients' investments with their ability to withstand the tradeoffs between risk and return. The Risk Meter helps clients control human emotions associated with risk and volatility.

MRC (MyRIACompliance)

MyRIACompliance is compliance software that provides Financial Gravity's RIAs theongoing compliance support needed in today's constantly changing regulatory environment. MRC is designed to not only keep our RIAs compliant, but in addition provide our registered professionals and staff with the mandatory oversight and continuing education.

Firelight

Financial Gravity utilizes a software platform, Firelight, that provides our Family Office Directors with a multi-carrier sales and processing system. This solution can deliver a suite of interconnected sales components that transforms the way insurance, retirement and investment products are marketed, sold and supported.   New Policies are processed through this platform.

SuranceBay (SureLC)

SuranceBay is a multi-carrier contracting automation system. FGEM professionals utilize this platform to help give agents and agencies an automated system to seamlessly perform functions related to licensing, contracting, and appointments.

Incomize (Time Optimized Planning TM)

Our proprietary TIme Optimized Planning tool, Incomize, creates a recommended asset allocation to achieve a sustainable retirement income spending plan over a client's life. This tool focuses on probabilities and expected returns so clients can gain confidence they will not outlive their

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