

## NEWS



### *For Immediate Release*

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## **T3 TECHNOLOGY CONFERENCE TO OFFER EXPERT COMMENTARY** *Financial Planning Industry Leaders to Speak on State of the Art Topics and Visions for the Future*

December 22, 2010 (Fort Lauderdale, FL) – David Drucker and Joel Bruckenstein, two of the financial planning industry’s most respected thought leaders and producers of the 6th Annual “**T3** **Technology Tools for Today™** Conference, today announced speakers and general session details for the conference to be held at the [Grand Hyatt Bonaventure Hotel in Weston, FL](#) February 16-19<sup>th</sup>, 2011.

“In addition to 25 great breakout sessions this year, we’ll have six general sessions and two ‘Super Sessions,’” said Drucker. “With Super Sessions, there are only two choices per time slot. General sessions are one per time slot, and breakout sessions are five per time slot.”

The general session “Great Expectations: Using Technology to Satisfy Increasingly Demanding Clients and Prospects ... and Benefiting from It” will explore social changes that drive increased expectations and technology solutions that can help advisors answer these demands. This general session, presented by Brent Burns of Asset Dedication (<http://www.assetdedication.com>), will then examine the resulting business benefits of new paradigms such as the cost savings associated with going green.

Another general session, “Portfolio Construction in a UMH Environment,” will be presented by Bill Crager, president of Envestnet (<http://www.envestnet.com>). In this session, Crager will explore techniques for portfolio construction and the potential benefits of the UMH approach for a fiduciary practice.

Dr. Martin Carmichael, the Chief Security Officer for TD Ameritrade Institutional (<http://www.tdainstitutional.com>), will also be leading a general session (see Joel Bruckenstein's comments about Carmichael's February 2010 speech at the TD Conference here: <http://www.morningstaradvisor.com/articles/fcarticle.asp?docId=18604&sPage=1>). This highly knowledgeable security executive with more than 20 years experience, is an expert in company threat and risk assessment methods, the design of secure environments, security problem solving and blending a business return on investment with corporate information protection needs.

In addition to sponsoring one of the general sessions, TD Ameritrade Institutional will also be showcasing their unique Veo Open Access solution in the exhibit hall (read summary by Investment News Technology Reporter Davis Janowski here: <http://www.investmentnews.com/article/20100808/reg/308089977>). "The exhibit hall has always been a popular aspect of the conference. This year there will be nearly 70 technology booths for conference goers to explore," adds Drucker.

Another general session, sponsored by Laserfiche ([www.laserfiche.com](http://www.laserfiche.com)), "Inside Job: The Streamlining of a Wealth Management Enterprise through ECM (Enterprise Content Management)" presented by Rehman Financial will follow a growing wealth management firm's journey as it addresses information management challenges by adopting ECM through the eyes of an individual advisor.

Quantuvis, a national consulting firm that specializes in business consulting to financial advisors and institutions ([www.quantuvis.com](http://www.quantuvis.com)), will be presenting another general session. And, new this year, the conference will include two super sessions—one presented by Fidelity Institutional (<http://institutional.fidelity.com>) and the other by Neesha Hathi, Vice President of Advisor Technology Solutions at Charles Schwab Institutional (<http://www.schwabadvisorcenter.com>).

The closing session will be lead by Bob Veres ([www.bobveres.com](http://www.bobveres.com)), one of the most influential people in the financial planning profession. Often humorous and always entertaining, Veres will look toward the future of the financial planning profession through his real-world observations and experiences. "Bob is an insightful commentator," says Joel Bruckenstein. "Sharing his vision for the future of our industry at the close of the event will provide a contextual framework for conference participants to integrate the knowledge and information they gain."

In addition to the industry influentials named above, many other high profile industry experts will be contributing to the conference, including Deena Katz, a Texas Tech University faculty member (<http://www.depts.ttu.edu/pfp>), who will lead a session on advisor technology platforms, and Marie Swift, President of Impact Communications, Inc. ([www.marieswift.com](http://www.marieswift.com)), who will be providing insights on managing and leveraging social media.

For conference registration, sponsorship application and additional details, visit T3's newly revamped website, [www.TechnologyToolsForToday.com](http://www.TechnologyToolsForToday.com). Standard price of \$ 375.00 ends on 2/15/2011 at 11:59 p.m. Late/Onsite price of \$ 400.00 starts on 2/16/2011 at 12:00 a.m. Follow the T3 Community at [www.Twitter.com/t3fan](http://www.Twitter.com/t3fan). Watch a series of short videos from past T3 Conferences and read other important information at [www.T3Conference.blogspot.com](http://www.T3Conference.blogspot.com).

## **ABOUT THE T3 AND THE TECHNOLOGY TOOLS FOR TODAY™ BRAND**

### **David J. Drucker, MBA, CFP®**

Under the banner of "Drucker Knowledge Systems," David J. Drucker, MBA, CFP® provides the benefit of his more than 25 years of experience and research to other members of the financial services industry.

He is the co-author of *The One Thing... You Need to Do As Told by the Financial Advisory Industry's Top Coaches, Consultants and Visionaries* (The Financial Advisor Literary Guild, 2005), *Tools & Techniques of Practice Management* (The National Underwriter Company, 2004) and *Virtual Office Tools for a High-Margin Practice: How Client-Centered Financial Advisors Can Cut Paperwork, Overhead, and Wasted Hours* (Bloomberg Press, 2002). He is also editor of *T3: The Newsletter*.

Drucker writes on technology and practice management issues for financial advisors as a columnist or contributor to *Financial Advisor* and *Financial Planning* magazines. He recently resigned from monthly columnist duties for [www.MorningstarAdvisor.com](http://www.MorningstarAdvisor.com) so that he could spend more time writing white papers, editing the T3 Newsletter and producing the T3 Conference.

### **Joel P. Bruckenstein, CFP®, CMFC**

Freelance magazine writer, book author, virtual office consultant and fee-only financial advisor Joel P. Bruckenstein, CFP®, is the Publisher of *T3: The Newsletter*. He frequently contributes articles to other financial planning publications including *Financial Advisor Magazine* and *Financial Planning Magazine*. For many years, he was the Senior Technology Editor at [www.MorningstarAdvisor.com](http://www.MorningstarAdvisor.com).

*Virtual Office Tools for a High-Margin Practice*, Bruckenstein's practice management and technology book co-authored with David Drucker, has garnered universal praise from industry experts. The duo's second book, *Tools and Techniques of Practice Management* which was published by National Underwriter Company in 2004, has also received good reviews.

Bruckenstein's expert opinions have appeared in *The Wall Street Journal*, *The New York Times*, *Business Week*, *The Baltimore Sun*, *The Washington Post Investment Advisor Magazine*, *Investment News*, *Gannett Newspapers*, and the *New York Daily News*, *Kiplinger's Retirement Report*, *the Journal of Financial Planning* and other publications.

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