

NEWS



For Immediate Release

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T3 TECHNOLOGY CONFERENCE REPORTS RECORD ATTENDANCE AT 2011 EVENT, ANNOUNCES DATES AND LOCATION FOR T3 2012

MARCH 31, 2011 (Fort Lauderdale, FL) – David Drucker and Joel Bruckenstein, producers of the “**T3**” **Technology Tools for Today™ newsletter and annual conference**, today released additional statistics and comments about the sixth annual T3 conference, held at the Grand Hyatt Weston in Florida February 16–19th, 2011. In addition, the conference organizers have now announced the dates and location for T3 2012.

OVERVIEW OF T3 2011

“T3 2011 was well received, with over 500 professionals in attendance,” reported David Drucker. “Attendees enjoyed visiting with a wide variety of technology solutions providers — 75 booths in all — spread out in two exhibit halls, grouped based on type of solution provided. Conference sponsors, as well, were pleased with the groupings and overall success of the event.”

“This is our sixth year organizing and producing the conference,” added Joel Bruckenstein. “It’s gratifying work. We had record attendance at T3 2011 and were very pleased with the enthusiastic support provided by the speakers, sponsors and industry allies who helped to make the event such a big success.”

“What we know after attending the last couple of T3 events is that the conference is really one of the financial planning industry’s leading technology conferences. As providers of the industry’s first online practice manager, Quantuvis sees the annual T3 conference as a unique opportunity to promote our products and solutions not only to our potential clients but also to ensure that our peers and potential partners are aware of the possibilities we bring in the practice management technology arena,” said Dana Marino, Consulting Manager with Quantuvis Consulting Inc.

“We were pleased to see familiar faces and meet new friends,” Marino continued. “This year the conference provided great thought leadership and appeared to be well attended by not only the big players, movers and shakers, but also several newcomers with innovative, creative and helpful solutions for our industry.”

Conrad Foster, President and CEO of CEO Imaging Systems, Inc. agreed saying: “CEO Imaging Systems and Fujitsu have been proud Platinum sponsors of T3 from the very first conference. Both the T3 newsletter and the T3 conference are the leading technology resources for the financial advisor industry. The conference attracts a wide spectrum of both small and large firms including large broker-dealer networks, independent RIAs and technology consultants involved within the industry. The conference also brings together the leading technology developers and providers, including our company; we collaborate and integrate our technology with many of the other solutions providers there. The conference also attracts many of our current as well as prospective new clients so it presents a great business opportunity for our company. T3 is a valuable forum for both education and transacting business. In our view, it is one of the most important events for the industry we attend every year.”

In addition to interacting with sponsors in the exhibit hall, participants had many educational opportunities including seven general sessions and 25 breakout sessions on Friday and Saturday, plus 26 pre-conference sessions the preceding Wednesday and Thursday.

“Year after year, Joel Bruckenstein and David Drucker put on the industry’s best technology focused conference,” said Michael Wilson, Director of Marketing at Morningstar. “They have a knack for building an agenda that deals with issues that advisors face now, as well as the ones that they will face in the future. Integration is always a big topic of discussion at T3 conferences. It’s clear that many advisors are still struggling with how to integrate the disparate software upon which their firms run. It’s a hot topic among the software vendors, custodians and advisors because it’s clear that many advisors are struggling with antiquated and inefficient software. What’s great about T3 is that it gives us the opportunity to talk about how our 2500+ Morningstar Office users are working smarter and more efficiently using our all-in-one platform for their Portfolio Management, Research, Planning, CRM, Billing, and Client Web Portal needs. It’s a great conference and we are pleased to be one of its main sponsors,” Wilson said.

Networking opportunities for both sponsors and attendees were abundant, according to Brain Davis, Director of Advisor Services at Scottrade Advisor Services. “The T3 Conference is not only a great conference for us to reach our existing customers and potential new customers, but it provides an excellent venue for us to create new partnerships with technology vendors who can help our advisors streamline their technology and operational processes. Many of our current partnerships were the result of our attendance and sponsorship of the T3 Conference,” Davis said.

Photos and a number of short video interviews from this and past T3 Conferences can be viewed at www.T3Conference.blogspot.com and www.technologytoolsfortoday.com.

ANNOUNCING T3 2012

“We are pleased to announce the dates and location for the T3 2012 conference, and look forward to seeing both old friends and new at the Hilton Anatole in Dallas, Texas, February 16-18, 2012,” Drucker said. “The pre-conference sessions, which are really more like free bonus sessions for attendees, will be held Thursday, February 16th.”

“Additional details will be available soon,” added Bruckenstein. “Meanwhile, the best thing for people to do is become a part of the T3 Community. They can follow us on Twitter under the handle @t3fan and read the Twitter stream at www.Twitter.com/t3fan, or sign up to follow our blog postings at www.T3Conference.blogspot.com. T3 newsletter information is available on our website, www.technologytoolsfortoday.com. Our newsletter subscribers are always the first to know about breakthrough technology and new outsource solutions, events and other breaking news.”

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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 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.

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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