

Technology Services

Technology Software Solutions: BFWM uses our own preferred suite of technology solutions for our business needs. Includes but not limited to Orion, IRebal, Docupace, DocuSign, ThinkPipes, Laser App Integration & RedTail. We will also support any technology solutions that our advisors use or want to use as long as they meet the necessary compliance requirements.

Technology Integration Team: BFWM offers each onboarding advisor/firm a hands-on technology transition specialist to help you and your team utilizing state of the art platform.

Fee Payment Reporting, Performance Reporting and Data Aggregation: BFWM has contracted with Orion, one of the foremost advisor/firm portfolio management and data aggregation tools on the market. By being part of the BFWM network, advisors can utilize Orion for all of their wealth management performance reporting across multiple custodians, while also providing their clients a personal login.

Document Storage and Electronic Paperless Processing: BFWM's relationship with Charles Schwab allows an advisor utilizing Charles Schwab's platform to process account openings without ever touching a piece of paper. BFWM also utilizes Docupace, a cloud-based solution for electronic document storage and paperwork processing for any advisors conducting fee-based business.