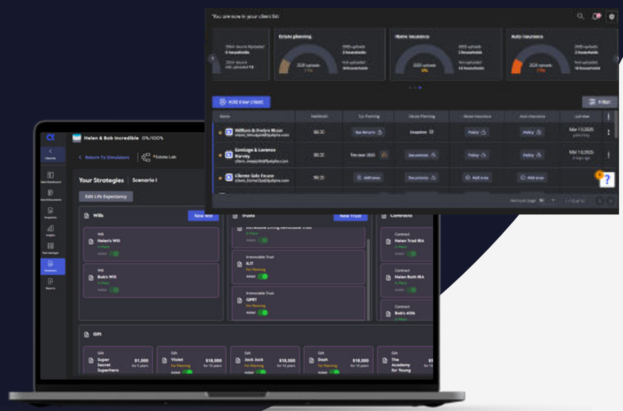
fp alpha

ESTATE PLANNING SIMPLIFIED:

Your All-in-One or Standalone Solution for Capturing New Opportunities

FP Alpha's expert-driven estate planning capabilities empower advisors to offer estate planning services at scale, fueling their revenue growth.



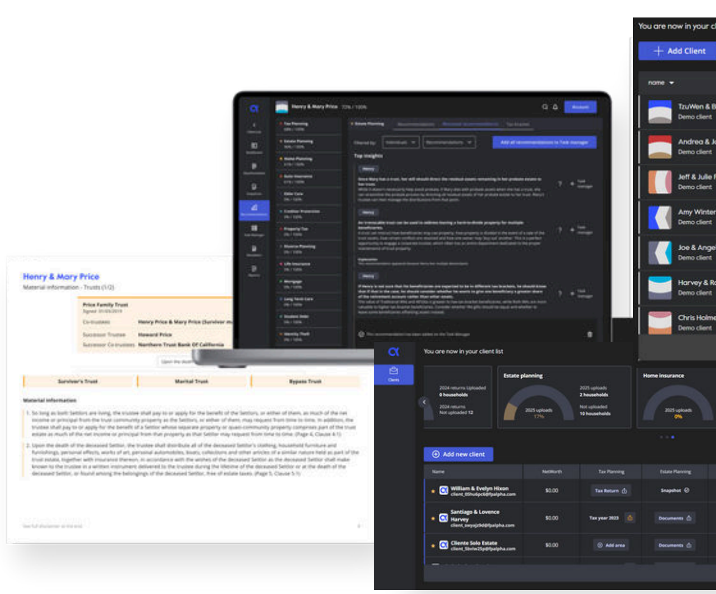
Create More Value for Clients Without the Headache

For advisors who want to provide accurate, cost-effective estate planning, FP Alpha helps you:

- Save time without compromising accuracy
- Enhance client service beyond investment management
- Streamline fragmented tech solutions
- Focus on more high-value conversations
- Automate document review and assessment
- Capture tax-saving opportunities

Retain client assets when an estate passes to the next generation.

Turn FP Alpha's Powerful Estate Planning Features into Your Competitive Advantage



ESTATE SNAPSHOT

Transform complex legal documents into a clear visual summary showing asset distribution and key individuals in the estate plan—simply upload client documents and let AI do the work.

ESTATE PLANNING LAB

Transform complex legal documents into a clear visual summary showing asset distribution and key individuals in the estate plan—simply upload client documents and let AI do the work.

EXPERT-DRIVEN INSIGHTS

Automatically receive actionable recommendations like "more efficient gifting can help close gaps in the estate plan" or "deploy strategies to minimize estate tax liabilities."

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What The Industry Is Saying About FP Alpha

#1 Estate Planning Software

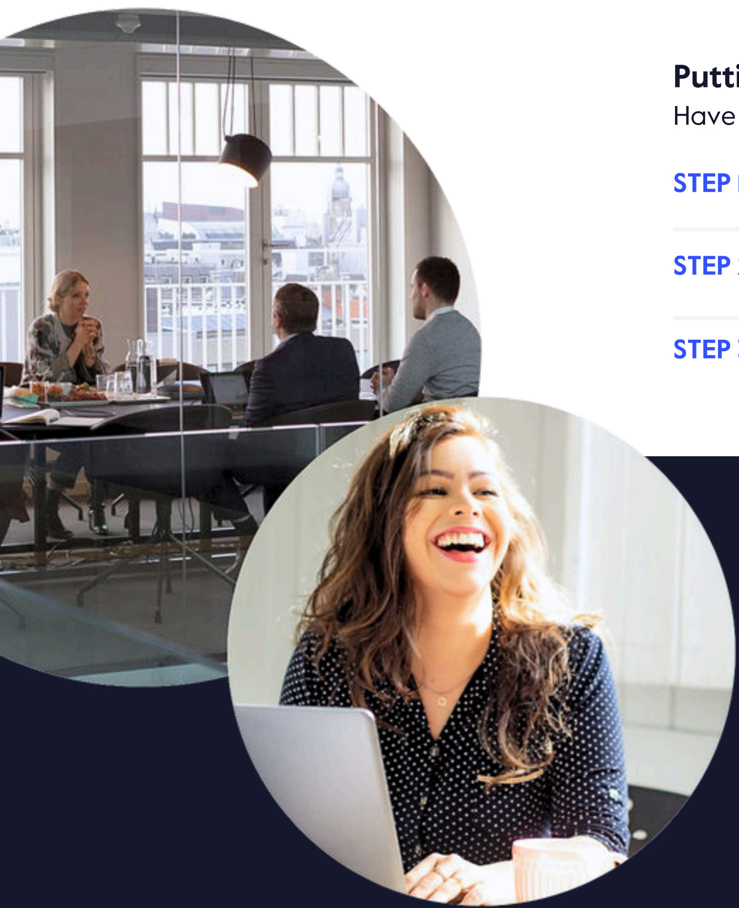
according to Kitces.com's "Technology That Independent Financial Advisors Actually Use and Like"

8.46 Advisor Satisfaction Rating

on the 2025 T3/Inside Information Advisor Tech Survey (second year with a rating of 8.0+)

"FP Alpha isn't just a time-saver—it enables an **entirely new dimension of our planning** portfolio. Without it, we couldn't offer estate reviews as a service to our clients at scale. This tool has been **transformative**, helping us **deliver greater value to clients, foster multi-generational planning, and elevate the comprehensiveness** of our planning services."

Current Enterprise RIA - Philadelphia, PA



Putting FP Alpha into Action at Your Firm

Have more meaningful conversations with clients in three simple steps.

STEP 1. Start by asking clients about their estate planning needs

STEP 2. Offer to provide a clear, visual summary of the plan

STEP 3. Set aside time to identify gaps and discuss strategies to close them

Ready to learn more?

Scan the QR code to schedule a personalized demo with FP Alpha.