

# FPA

CERTIFICATE IN FINANCIAL PLANNING & ADVISORY

## Technology for Wealth Management



# Content

1. Cloud Drives
2. Handy Tools
3. Research
4. Software
5. Website for Data
6. Transaction Platforms
7. Digital Marketing



# Section

## 1. Cloud Drives



# Cloud Drives

## Drives

iCloud

One Drive

Google Drive

Dropbox

Sync

## Systems

Apple

Microsoft

Google

Dropbox

Andriod, Apple, Windows, Google



# Section

## 2. Handy Tools



# Handy Tools

- Chrome Extensions, Bookmarks, History
- Grammarly
- LastPass
- WhatsApp Web
- Google Keep
- WeTransfer
- Google Calendar
- Financial Calculator - BishiNew



# Section

## 3. Research



# Research

- Value Research
- Morning Star
- NGen
- Money Control
- TurtleMint
- Bank Bazaar
- ClearTax
- TaxGuru





## Section

# 4. Wealth Management Software



# Software

- IFANow
- OFA
- OmniMax
- RedVision
- MS Excel



# Section

## 5. Websites for Data



# Data

- SEBI
- RBI
- IRDAI
- AMFI
- Mutual Fund Sahi Hai
- BSE
- NSE



# Section

## 6. Transaction Platforms



# Transact

- MFU
- BSE Star
- NSE NMF II
- Zerodha
- Small Case



# Section

## 7. Digital Marketing



# Digital Content

- Remove.bg
- Canva
- Pictures - Copyrights
- Buffer, Hootsuite
- Lee Tags
- MailChimp
- Vimeo
- Google Analytics
- iLove PDF



**Thank You**