

Lead Generation TOOLS & PLATFORMS

Wiser Advisor

Matches live-agent verified prospect leads with pre-screened FINRA/SEC registered advisors for follow-up. Features educational materials and financial advisor blog directory.

<https://www.wiseradvisor.com/>

Indyfin

Featured on Kitces Nerd's Eye View and Financial Advisor Magazine, matches prospects with local/niche advisors. \$65/user, billed monthly OR \$650/user, billed annually

<https://indyfin.com/>

Planswell

Canadian/US planning and advice platform geared toward those just getting started with financial advice. Offers a Financial Planning Software free to advisors, along with training, funnels and calling scripts and resources.

<https://partners.planswell.com/advisors>

Smartasset

A free advisor match quiz puts prospects in touch with fiduciaries.

<https://smartasset.com/>

Datalign

Featured on Yahoo! Finance, Financial Advisor IQ, Associated Press and others, Datalign Advisory matches prospects with advisors through a discovery quiz that goes beyond portfolio size. Advisors are vetted on disclosures, disciplinary history and an interview.

<https://www.datalignadvisory.com/>

My Perfect Financial Advisor

With a flat fee of \$995/year for advisors and intent to deliver at least one new client annually, the platform algorithm does not allow either party (advisor or prospect) to peruse profiles; hence it has been described as "eharmony for investors and advisors."

<https://myperfectfinancialadvisor.com/advisors/>

FinancialAdvisors.com

Flat rate fee with advisor application to this free directory.

<https://financialadvisors.com/register/advisor>



Advice Chaser

Advisors are vetted for licensing, experience, regulatory history, and demeanor. Users provide advisor feedback. Does not sell prospect information and matches to only one advisor at a time.

<https://advicechaser.com/>

Wealth Ramp

Featured on Forbes, HerMoney, NerdWallet, Business Insider and NPR, Wealth Ramp matches prospects with fee-only financial advisors who are vetted and approved after an extensive interview with founder Pam Krueger.

<https://wealthramp.com/>

Wealth Tender

Featuring Limitless' own Russ Thornton, Wealhtender is the #1 find-an-advisor website not sponsored by a national wealth management firm, credentialing organization, or industry association. Features financial advisors with a greater diversity of backgrounds.

<https://wealhtender.com/>

Lasso

App allows prospects to test-drive working with an advisor. Free online lead gen platform helps advisors and prospects connect quickly, for free. Lasso partners with asset managers to feature their funds on Lasso, which advisors can then choose to include in proposals.

<https://advisor.getlassoapp.com/>

Zoe Financial

Qualified advisors with a minimum of 5 years' experience can apply to become a Zoe Vetted Advisor and get paired with prospects who have been educated on different fee payment options and differences between an aligned-interest RIA and a broker. Income and asset levels are verified to ensure advisor minimums are met.

<https://zoefin.com/join-as-an-advisor/>

Do you have an lead generation tool or solution that you love? Send it to coaching@limitlessfa.life and we'll work to keep this resource list updated.

