Technology Assessment Checklist  
 *This checklist can be used to guide the software selection process. It is not intended to be an exhaustive questionnaire or RFP. Rather, it is a simple tool to maximise the likelihood of selecting both a partner and system to meet your needs.*

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| **Vendor assessment** | **Response** |
| Where is your company registered? |  |
| How many years have you been offering the product to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ sized businesses? |  |
| What is the ownership structure of your company? |  |
| What is the company vision?  Do you have stated mission/values? |  |
| How much available capital does the company have? |  |
| What is the rate of growth (revenue, team size, customers) over the past 12mths? |  |
| What is our escalation path if issues arise? |  |
| How well do you understand  the Australian financial planning industry? |  |
| What support exists for our business? |  |
| How frequently is the product updated  and are updates included at no additional cost? |  |
| How ‘turn-key’ is the implementation? |  |
| How configurable is the system? |  |
| How extensive is the ecosystem? |  |
| What is compliance record of your company? |  |
| What is your companies knowledge  of the financial planning regulatory obligations? |  |
| What data protections are in place? |  |
| How long is the contract and what are our options  for termination? |  |
| Is a free-trial period available? |  |
| Are reference clients available? |  |
| Is ongoing training available? |  |