



# HUBLY

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## **XY Planning Network and Hubly Announce a Partnership to Help Advisors Scale Their Fee-for-Service Firms**

VANCOUVER, CANADA, May 3, 2022 – XY Planning Network (XYPN), the leading financial planning platform for fee-for-service financial advisors serving next-gen clients, and Hubly, a technology provider reimagining practice management for financial advisors, today announced a partnership that will help XYPN advisors more efficiently and effectively scale their financial planning firms.

The partnership between Hubly and XYPN will help XYPN advisors streamline systems and processes and optimize their operations, providing them a solution to overcome the operational challenges that so often constrain and limit firm growth. Hubly’s easy-to-use technology will empower XYPN advisors to deliver an exceptional client experience and enhance their back-office operations by optimizing key processes and creating a streamlined work environment for their teams. Through this partnership, XYPN’s expert coaches—who guide XYPN advisors through the complexities of running and growing their fee-for-service firms—will be exclusively trained on Hubly so they’re equipped to share best practices and support members in achieving their growth goals.

“Having worked with hundreds of financial advisory firms, we understand the need for an easy-to-use practice management solution to replace inefficient tools such as spreadsheets. Through this partnership, XYPN can leverage the Hubly product to help even more advisors overcome their core operational challenges, optimize their operations, and scale their fee-for-service firms,” said Louis Retief, CEO and Co-founder of Hubly.

Of the impact this partnership will have on XYPN’s 1,600+ advisors, XYPN Director of Partnerships, Jordan Hutchison said, “Financial advisors have never-ending to-do lists and often feel overwhelmed by the perceived impossibility of getting it all done. We’re excited to partner with Hubly to help our members overcome their overwhelm and to give them a sense of order amid the chaos of running their firms. XYPN advisors are committed to delivering exceptional value to their clients, and Hubly will help them

provide a seamless client experience as they look to grow their firms and expand their impact.”

### **Hubly at T3 in Denton, TX**

Hubly will be at the T3 Technology Conference on May 2-4, 2022 in Denton, Texas, with a booth in the Emerging Technology section. Stop by during breaks to speak directly to their team about their software. T3 conference goers can take advantage of this opportunity to meet Hubly Co-founders, Louis Retief, CEO and Ron Gorodetsky, COO. Louis Retief will also be speaking live on Wednesday May 4th at 2:00 p.m. in the Equestrian Ballroom on the topic; *Why Scaling Your Firm has More to do with your Back Office Than you Think.*

### **About Hubly**

[Hubly](#)'s product helps growing financial advisory firms manage their practice and deliver an exceptional client experience with a visual dashboard to manage best-practice workflows, processes, and individual client relationships. With seamless communication, task assignment, and tracking, Hubly's easy to use software prevents things from falling through the cracks for financial advisors and their teams.

For more information visit; [www.myhubly.com](http://www.myhubly.com)

### **About XY Planning Network**

[XY Planning Network](#) is the leading financial planning platform for fee-for-service financial advisors who want to serve next-gen clients, providing comprehensive financial planning services for a monthly subscription fee without product sales or asset minimums. The Network offers a virtual community for new and established financial advisors executing a fee-for-service business model, including compliance services, sales and marketing support, business tools and templates, and a full stack of technology solutions.