

## In case you missed it! Recap - CE Sandwich: The Future of Technology and Infrastructure

**General Update - No Action required responding by**



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More information can be found here: <https://www.cantorinfrastructurefund.com/>

Additional Resources: <https://financialplanning.arizona.edu/>

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### **Role of Technology & Digital Infrastructure in Financial Planning & Portfolio Construction**

Technology and digital infrastructure have revolutionized everyday life and the financial planning profession, ushering in unprecedented levels of efficiency, accessibility, and precision. These technological advancements have enabled financial professionals and individual investors alike to gather, process, and analyze vast amounts of data, allowing for more informed decision-making. This democratization of financial advice has opened doors for a wider range of individuals to access expert-level portfolio management.

In portfolio construction, technology plays a pivotal role in optimizing asset allocation and risk management. This takes into account historical market data, economic indicators, and even psychological factors, enhancing the accuracy of risk assessments and the selection of suitable investment options. Real-time tracking and reporting enable swift adjustments to portfolios, aligning them with changing market trends and economic conditions. Moreover, technology-driven simulations and stress tests provide insights into potential scenarios, aiding in the creation of well-rounded portfolios that can weather various market conditions.

The integration of technology in financial planning also enhances client-advisor interactions. Virtual meetings, online collaboration tools, and mobile apps facilitate seamless communication and information sharing between advisors and their clients across geographical boundaries. This connectivity promotes timely updates, transparent reporting, and more frequent portfolio reviews, fostering a stronger sense of trust

and partnership between investors and their advisors. As technology continues to evolve, its role in financial planning and portfolio construction will likely become even more central, shaping a future where data-driven strategies and personalized advice are more accessible and effective than ever before.

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Steve Pointer is a Senior Vice President at Cantor Fitzgerald Asset Management, a global financial services and wholesale distribution firm. Steve brings over 15 years of experience in working with wealth management, accounting, tax and legal professionals on the education and implementation of sophisticated alternative investment solutions, including Real Estate, Infrastructure, 1031 Tax Deferred Exchanges, and Qualified Opportunity Zone Funds.

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