

Global Financial Planning Software Market Growth (Status and Outlook) 2025-2031

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Abstracts

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The global Financial Planning Software market size is predicted to grow from US\$ 2041 million in 2025 to US\$ 4408 million in 2031; it is expected to grow at a CAGR of 13.7% from 2025 to 2031.

Financial planning is a long-term process of wisely managing your finances so that you can achieve your goals and dreams, while at the same time helping to negotiate the financial barriers that inevitably arise in every stage of life.

Global Financial Planning Software key players include eMoney Advisor, Advicent, PIEtech?, Inc., Money Tree, etc. Global top four manufacturers hold a share over 45%.

USA is the largest market, with a share about 45%, followed by India, and UK, both have a share over 35 percent.

In terms of application, the largest application is SME, followed by Large Enterprise, Personal Purpose, etc.

LPI (LP Information)' newest research report, the "Financial Planning Software Industry Forecast" looks at past sales and reviews total world Financial Planning Software sales in 2024, providing a comprehensive analysis by region and market sector of projected Financial Planning Software sales for 2025 through 2031. With Financial Planning Software sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Financial Planning Software industry.

This Insight Report provides a comprehensive analysis of the global Financial Planning Software landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Financial Planning Software portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Financial Planning Software market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Financial Planning Software and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Financial Planning Software.

This report presents a comprehensive overview, market shares, and growth opportunities of Financial Planning Software market by product type, application, key players and key regions and countries.

Segmentation by Type:

Cloud-based Financial Planning Software

On-premise Type Financial Planning Software

Segmentation by Application:

SME

Large Enterprise

Personal Purpose

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

PIEtech, Inc.

EMoney Advisor

Advicent

Money Tree

WealthTec

Oltis Software

Advisor Software

Investnet

InStream Solutions

Wealthcare Capital Management

SunGard WealthStation (FIS)

Advizr

RightCapital

Cheshire Software

Razor Logic Systems

Moneywise Software

Struktur AG

Futurewise Technologies

ESPlanner Inc.

ISoftware Limited

FinPal Pty Ltd

WealthTrace

Sigma Conso

Prevero GmbH (Unit4)

SAP

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