



For the first time ever First Affirmative's [Values Aligned Direct Index Solution \(VADIS\)](#) built in partnership with YourStake, gained a top ranking in Advisor Satisfaction with a **9.33** in the new Portfolio Design Solutions category in the T3/Inside Information Survey.

VADIS was also named a Mighty-Mite for stand out advisor ratings in Portfolio Design Solutions (**9.33**) and SRI/ESG Analysis Services (**8.67**) highlighting the continued success of coupling bleeding-edge investment technology with deep asset management experience and outstanding customer service to offer personalized Direct Indexing.

Additionally, YourStake and VADIS carried high scores in the Portfolio Management/Reporting Tools category with an **8.38** and leading **9.60** satisfaction rating, respectively.

The results demonstrate a commitment to offer more technology solutions to meet the growing needs of Advisors of all sizes, from small RIAs to the largest aggregators, Broker-Dealers, and Asset Managers.

We are thrilled to partner with YourStake as they receive the highest user rating for the second year in a row (**VADIS uses YourStake analytics and data**) and is steadily gaining market share as the most comprehensive solution.

About First Affirmative:

Since 1988, [First Affirmative](#) has been helping financial advisors and their clients create investment solutions designed to meet both financial and impact goals. First Affirmative's unmatched institutional grounding in this ecosystem allows them to deploy the fundamental research, quantitative techniques, portfolio construction and management methodologies to deliver outcome-oriented SRI and ESG investment solutions. First Affirmative is proud to have adopted the highest standards as an investment fiduciary. First Affirmative is a Certified B Corp and was honored as a "Best for the World" Company in 2019 by B Lab, the parent organization for Certified B Corps.

About YourStake

[YourStake](#) provides technology solutions that power the amazing for Advisors and their clients.

Founded in 2019, YourStake serves over 250 advisory firms, including top RIAs and broker dealers cross the wealth management industry as well as asset managers and TAMPs. YourStake is also SOC2 Type 2 certified.

Recently, YourStake launched, [Advisor Core](#) which just reached over 150 Advisor users that enable advisors to win more clients with faster proposal turnaround with the following features:

- Upload any client statement and download a formatted spreadsheet containing holdings in minutes
- Receive instant analysis of the uploaded portfolio against a set benchmark
- Chat-with-portfolio to glean insights
- Output a customizable, on-brand presentation

About the Annual 2024 T3/Inside Information Advisor Software Survey

The goal of this [annual survey](#) is to address the most basic questions that software users and competitors in the financial advisory space would plausibly be asking. The community of consumers and providers is interested in which tech solutions are most popular in each category, and the satisfaction levels (on a scale of 1-10) of their users. This data is especially important to the people who make software decisions at advisory firms—the consumers in this ever-evolving marketplace who are charged with creating and maintaining a functional tech stack in an ever-shifting marketplace.

The 2024 survey collected data from 2,917 advisory firm participants, anonymously, through the months of November and December 2023.

Read the [full report](#)