ToolGPA

NOVEMBER 2026

Wealthbox

The Insider's Guide

CRM built for financial advisors and wealth management firms



Every plan, grade, refund rule and rival among CRM tools, read from Wealthbox's own pages.

Made by Wealthbox, LLC · checked Nov 12, 2026 · toolgpa.com

1.8
GPA



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Who made this guide, what else is on the site, and how to cite it

ToolGPA put this guide together from Wealthbox's own pages, its app-store listings and our grades. Every fact in it is on Wealthbox's page too, where it is kept up to date. Checked Nov 12, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

1.8

GPA, above 5 of the 72 other CRM tools we grade

Wealthbox is a CRM for financial advisors and the firms around them, with contact and household records, task and opportunity tracking, workflows, email sync and a calendar. It has a companion mobile app and says it is SOC 2 compliant. Wealthbox AI Agents are included on every plan, while the AI Notetaker and file storage Vault are paid add-ons.

To get you started, here are **9 things to know about Wealthbox**, taken from its own pages and our grades.

1 **Best for a CRM for independent financial advisors**

Wealthbox is a CRM for advisors and RIA teams from $65 a user a month.

2 **Paid plans start at $65 a month for each person**

As its pricing page puts it: $65 per user / month (billing basis not stated).

3 **You can try it first**

14-day free trial

4 **It runs on 3 platforms**

Web, iOS and Android.

5 **Contacts and households**

Contact and household records with segmentation tags, contact roles and groups, kept in an activity stream the whole team can see.

6 **Opportunity pipelines**

Opportunities on kanban boards: 1 pipeline on Basic, 3 on Pro, 5 on Premier and unlimited on Enterprise.

7 **Workflows**

Automated workflows start on Pro, with milestones and outcomes. Template sharing is added on Premier.

8 **A 1.8 GPA, above 5 of 72**

That is against the other CRM tools we grade, on value, the free plan, features, ease of use and platforms.

9 **Keep it**

To replace Wealthbox you would be making connections to other products, each kept working as those products change. That is not a weekend's work, with an AI app builder or without one.

Wealthbox at a glance

PRICING Free trial, from $65 per user / month (billing basis not stated)	FREE PLAN No
FREE TRIAL 14-day free trial	RUNS ON Web, iOS, Android
MADE BY Wealthbox, LLC	CATEGORY CRM Software
OUR GRADE 1.8 GPA, weak	

The report card

Best for a CRM for independent financial advisors

Wealthbox is a CRM for advisors and RIA teams from $65 a user a month. Workflows, email sync and broadcast email start on Pro at $85, and the AI notetaker is a separate $49 a user.

TOOLGPA REPORT CARD	Wealthbox	Graded Nov 12, 2026

SUBJECT	GRADE	COMMENT
Value for money	D	$65 a user on Basic and $85 on Pro, where workflows live, against a category middle of $25.
Free plan and trial	D	A 14-day trial, but the page doesn't say whether a card is needed. No free plan.
Features	C	Households, pipelines, calendar and reporting. Workflows and email sync need Pro, and dashboards need Premier.
Ease of use	C	No store rating on record. Workflows and integrations to set up.
Platforms and integrations	B	Web plus iOS and Android apps, with Schwab, eMoney, Addepar, DocuSign, Calendly and Zapier. No desktop app.
Grade point average		Weak, out of 4.0 **1.8**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who Wealthbox is for

- ✓ Fits if you are an independent advisor or small RIA team
- ✓ Works for firms that want one CRM across several workspaces

Who it is not for

- ✗ Pricey if you want automation, as workflows start on Pro at $85 a user
- ✗ Watch out: the AI Notetaker is $49 a user and Vault storage $29 a user, on top of any plan
- ✗ Tight if you store files, with 2 GB on Basic and 20 GB at most
- ✗ Watch out: the page doesn't say whether prices are billed monthly or annually

Good to know

Good for

- ✓ Independent financial advisors and RIA teams
- ✓ Firms that want one CRM across several workspaces

Worth knowing

- ⓘ The pricing page does not say whether per-user prices are billed monthly or annually.
- ⓘ The AI Notetaker costs $49 per user a month and the Vault file storage add-on $29 per user a month, on top of any plan.
- ⓘ Workflows, email sync and broadcast email need Pro; dashboards need Premier.
- ⓘ File storage is capped by plan, from 2 GB on Basic to 20 GB on Enterprise.

PART 02 · PRICING

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

$65

A month to start, for each person

Wealthbox is a paid product with a free trial, starting at $65 per user / month (billing basis not stated).

BASIC

$65

per user / month, billing basis not stated

Contact and household management, tasks, 1 opportunity pipeline, calendar and meetings, 2 GB file storage.

PRO

$85

per user / month, billing basis not stated

Everything in Basic, plus workflows and automations, two-way email sync, broadcast email and 3 opportunity pipelines.

PREMIER

$119

per user / month, billing basis not stated

Everything in Pro, plus customizable dashboards and homepages, workflow template sharing and 5 workspaces.

ENTERPRISE

Custom

Everything in Premier, plus enterprise SSO, unlimited workspaces, a dedicated account manager and priority support.

Trying it first

14-day free trial

Read from wealthbox.com on Nov 12, 2026.

What it does

Its main features, where it runs, what it works with and who makes it

3

Places it runs: Web, iOS and Android

CRM built for financial advisors and wealth management firms. Here is what it does, as its own site describes it, and what it covers: AI features, meeting notes, tasks, sales pipeline, workflow automation, reports, dashboards.

"

Households, pipelines, calendar and reporting.

From our grade for features

Contacts and households

Contact and household records with segmentation tags, contact roles and groups, kept in an activity stream the whole team can see.

Opportunity pipelines

Opportunities on kanban boards: 1 pipeline on Basic, 3 on Pro, 5 on Premier and unlimited on Enterprise.

Workflows

Automated workflows start on Pro, with milestones and outcomes. Template sharing is added on Premier.

AI Agents

The vendor says it offers 24 pre-built agents, or users can build their own, included on every plan.

Email and calendar sync

Two-way email sync starts on Pro. The comparison also lists two-way calendar sync and a Chrome extension for Gmail.

Reporting and dashboards

Reports, charts and customizable dashboards, with custom homepages on Premier.

Where it runs

Web · iOS · Android

What it works with

Addepar · Schwab · eMoney · DocuSign · Calendly · Zapier · Gmail

Wealthbox is made by Wealthbox, LLC.

Where it stands

Its grades against its category, and whether to keep it or make your own

5/72

Other CRM tools it is graded above

Wealthbox's GPA of 1.8 is higher than 5 of the 72 other CRM tools we grade, and level with 11.

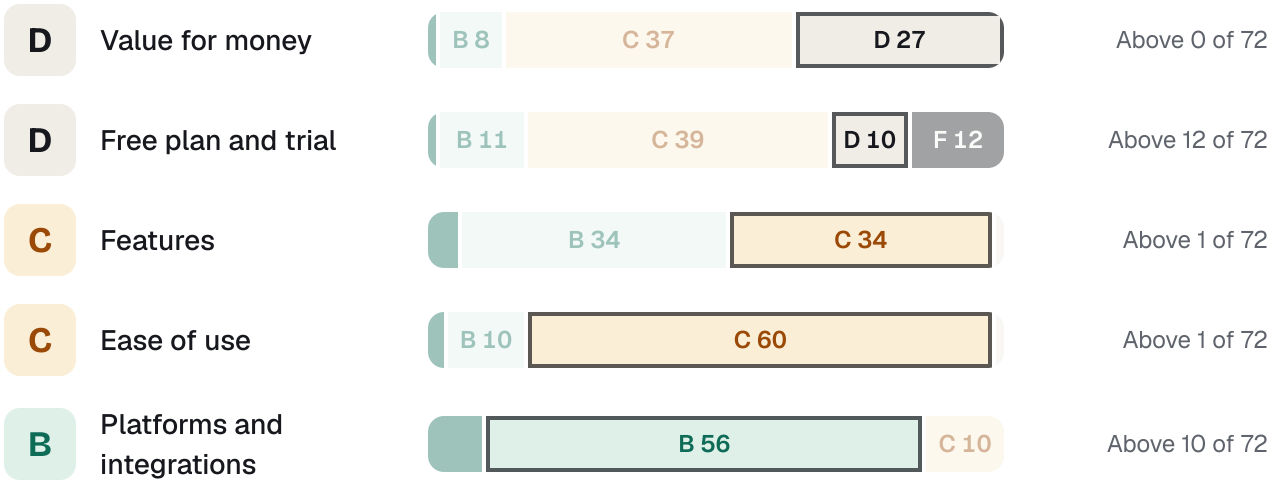
It stands best on platforms and integrations (B, above 10 of 72) and worst on value for money (D, above 0).

Its paid plans start at $65 a month for each person, against a middle price of $27.92 for the category: 54 of the 66 others that charge start lower.

On features, ease of use and platforms it scores 2.3 out of 4. 35 tools score higher and cost less.

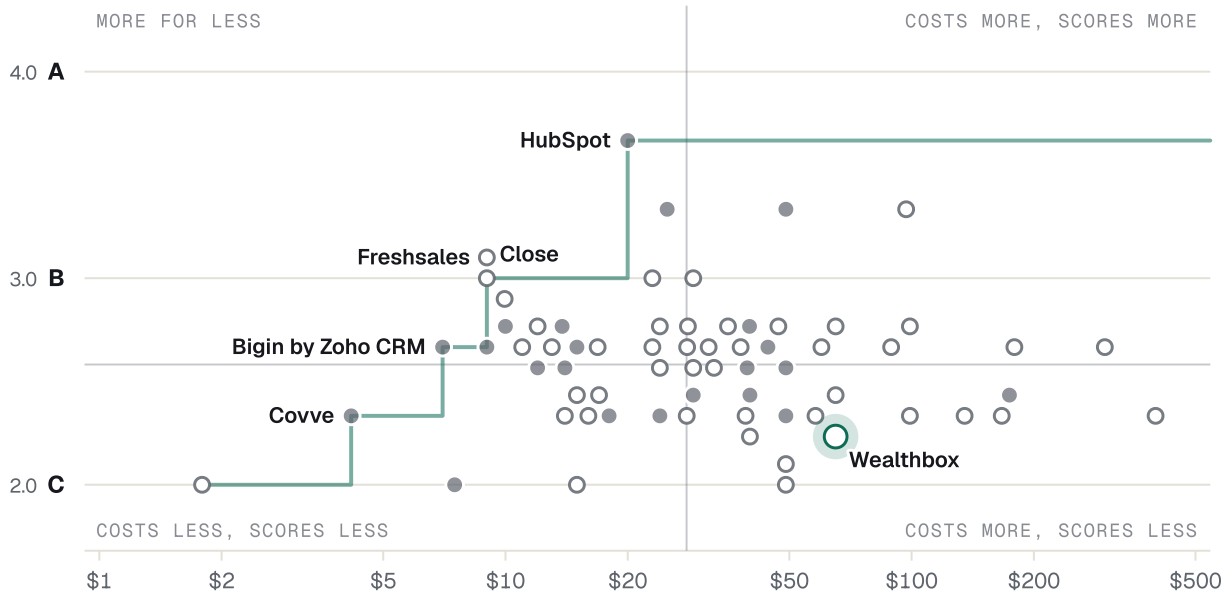
Each grade against the category

Every bar is all 73 CRM tools we grade, cut by the letter each got. Wealthbox's own letter is outlined.



Price against what you get

Each dot is one of 67 CRM tools. Further left costs less; higher up scores better on features, ease of use and platforms. Wealthbox is the marked dot.



What paid plans start at, a month (each step along is roughly double) ⍰

Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace Wealthbox you would be making connections to other products, each kept working as those products change. That is not a weekend's work, with an AI app builder or without one.

That makes this kind of software worth paying for, not this one in particular: 56 of the 72 other CRM tools grade higher. It costs $780 a year.

What you could make

- Sales pipeline, tasks and reports: an app builder makes these well.

What you could not

- Connections to other products, each kept working as those products change.
- A bot that joins your calls and turns the talk into notes.
- Connections that pull numbers from dozens of other services.
- A real app for iOS and Android. Something home-made would be a web page.
- It is priced for each person, which means accounts and billing for a team.
- AI features, unless you pay a model provider for each request yourself.
- What a company asks for before it lets staff use something: SOC 2.

What this rests on. Wealthbox's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



Redtail CRM, Maximizer CRM, Nutshell, Capsule CRM and Less Annoying CRM

The 5 tools Wealthbox is most often weighed against, with where each one differs from it.

2.0 GPA

Redtail CRM

Free trial · from $39/mo

CRM for financial advisors, with compliant texting and imaging.

- Only Wealthbox lists iOS and Android apps.
- Wealthbox also covers meeting notes, tasks and dashboards.
- Redtail CRM also covers calendar, documents and business texting.

Wealthbox and Redtail CRM compared in full

1.6 GPA

Maximizer CRM

From $65/mo

Customizable CRM that works from Outlook, with a finance edition.

- Only Wealthbox lists iOS and Android apps.
- Maximizer CRM is self-hostable, according to its own site.
- Wealthbox also covers meeting notes and tasks.

Wealthbox and Maximizer CRM compared in full



2.4 GPA

Nutshell

Free trial · from $13/mo

Sales CRM with email marketing, forms and AI built into every plan.

- Wealthbox also covers meeting notes, tasks and dashboards.
- Nutshell also covers booking links and forms.

Wealthbox and Nutshell compared in full



2.2 GPA

Capsule CRM

Free plan · from $18/mo

Small-business CRM for contacts, sales pipelines and projects.

- Capsule CRM has a free plan. Wealthbox does not, though it has a free trial.
- Wealthbox also covers meeting notes and dashboards.
- Capsule CRM also covers kanban boards.

Wealthbox and Capsule CRM compared in full



2.4 GPA

Less Annoying CRM

Free trial · from $15/mo

Simple CRM for small businesses at one flat per-user price.

- Only Wealthbox lists iOS and Android apps.
- Wealthbox also covers meeting notes, workflow automation and dashboards.
- Less Annoying CRM also covers calendar and forms.

Wealthbox and Less Annoying CRM compared in full

Quick answers

The questions people ask about it, each answered in a line or two

12

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is Wealthbox free?

No, Wealthbox is a paid product, but you can try it first. 14-day free trial.

How much does Wealthbox cost?

Wealthbox lists 4 plans. Basic: $65 per user / month, billing basis not stated.

What platforms does Wealthbox work on?

Wealthbox is available on Web, iOS and Android.

Does Wealthbox have a Windows app?

No Windows app was listed when its pages were read on Nov 12, 2026. Wealthbox is listed for Web, iOS and Android.

Does Wealthbox have a macOS app?

No macOS app was listed when its pages were read on Nov 12, 2026. Wealthbox is listed for Web, iOS and Android.

Is Wealthbox open source?

Wealthbox is not described as open source on its own site, as read on Nov 12, 2026.

What does Wealthbox integrate with?

Wealthbox's listing names Addepar, Schwab, eMoney, DocuSign, Calendly, Zapier and Gmail.

Who makes Wealthbox?

Wealthbox is made by Wealthbox, LLC.

What are the alternatives to Wealthbox?

The closest alternatives to Wealthbox in our directory are Redtail CRM, Maximizer CRM, Nutshell, Capsule CRM and Less Annoying CRM.

How does Wealthbox compare with other CRM tools?

Wealthbox's GPA of 1.8 is higher than 5 of the 72 other CRM tools we grade, and level with 11.

Is Wealthbox good value for money?

ToolGPA grades Wealthbox D for value for money. Its paid plans start at $65 a month for each person, against a middle price of $27.92 for the category: 54 of the 66 others that charge start lower.

Could I make my own version of Wealthbox?

To replace Wealthbox you would be making connections to other products, each kept working as those products change.

Where this guide comes from

The prices, plans, platforms and features were read from Wealthbox's own pages on Nov 12, 2026, and the grades were given on Nov 12, 2026. Graded from this listing, whose facts were read from Wealthbox's own pages on 12 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by Wealthbox, LLC. Prices change, so check wealthbox.com before you buy.

wealthbox.com/pricing/
wealthbox.com/about/
wealthbox.com/integrations/

PART 07 · ABOUT

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

5,038

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at **toolgpa.com**.

5,038	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

Wealthbox, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/wealthbox

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "Wealthbox: The Insider's Guide",
checked Nov 12, 2026.
https://toolgpa.com/tools/wealthbox
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Know someone choosing between CRM tools?

Send them this guide:
toolgpa.com/tools/wealthbox/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded CRM tools after Wealthbox, each with an Insider's Guide of its own.

CRM Software Insider's Guide

Every one of the 73 CRM tools we grade, compared

HubSpot Insider's Guide

Free CRM at the center of a marketing, sales and service suite

3.2 GPA

Bigin by Zoho CRM Insider's Guide

Pipeline-based CRM from Zoho for small businesses

2.8 GPA

Bitrix24 Insider's Guide

Flat-priced CRM with tasks, chat, video calls and a site builder

2.8 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what Wealthbox's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Wealthbox is a trademark of its owner, and this guide is not made, paid for or approved by Wealthbox, LLC. Prices and plans change: check wealthbox.com before you buy.