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Portfolio management tools free

If you manage a bunch of projects — and you're the only one working on them — the massive feature lists of most business-focused project management programs are overwhelming and unnecessary. So we wonder: What tool do you use to manage your personal projects? Photo by viZZZual.com. When you are a productivity army of one and you do not need communication tools that scale to a project group of two dozen workers and do not need to be able to share tasks and assign them to other people, it can be difficult to find a perfect fit project management tool. So many managers are packed to the rafters with features focused on managing projects within the confines of a large group of other workers that they become cumbersome for individuals to use. This week, we'd like to hear all about your favorite and just right-by-one project management tool. Hive Five nominations take place in the comments where you send your favorite tool for the job. We get hundreds of comments, so to get your nomination ready, include it at the top of your comment as: VOTE: Best Personal Project Management Tool. Please do not include your voice in a reply to another commenter. Instead, vote and respond to separate comments. If you don't follow this format, we may not count your vote. To prevent tampering with results, the votes of first-time commenters cannot be counted. Once you've made your nomination, let us know what makes it stand out from the contest. About the Hive Five: The Hive Five feature series asks readers to answer the most frequently asked questions we get: Which tool is the best? Once a week we will put a call to candidates looking for the best solution to a particular problem so you tell us your favorite tools to get the job done. Every weekend we will report back with the top five recommendations and give you a chance to vote on which is best. For example, check out last week's Five Best Book Recommendation Services. G/O Media can get a commission! It's disappointing to pull a book home from the library or shell out hard earned money on... Read more It's easy to find a project management tool for large groups, but finding one for personal use isn't a challenge that doesn't overwhelm you with group-focused features. Here's a look at five popular tools for personal project management. The spread on this week's Hive Five was wide-ranging. The answers you gave to the question What is the best personal project management tool? is, unsurprisingly, quite diverse and personal. We counted the voices, and in some cases folded very similar tools into a combined post, and now we're back to report on your favorite personal project management tools. This list now a little outdated, and we don't necessarily recommend the tools on this page for personal project management. For a more up-to-date list of great tools, check out our newer newer five on the same subject. When your to-do list becomes a monster, and an item next to a check box will actually take a long... Read more Todoist (Web-Based, Free) This image was lost some time after publication. G/O Media can get a commission! Todoist is a complete featured to-do and project management tool suitable for personal project management. You can easily sort your tasks into project and subprojects, manage the tasks in the project with additional sublists, and assign due dates to everything. Todoist integrates with Gmail for easy movement between your email inbox and your project management inbox. mGSD (Web-Based, Free) This image was lost some time after publication. Formerly known as MonkeyGTD, mGSD is a robust, TidilyWiki-powered personal management tool. Whether you're a supporter of David Allen's Getting Things Done system or not, but especially if you're- mGSD is packed with features to manage your projects in GTD style. You can easily mark input as next actions, part of a new or existing project, send them over to your tickler file for future reminders, or save them as reference material. You can save mGSD to any external web server (or Dropbox account) for remote access, or keep the file local for easy transport on the flash drive. G/O Media can get a commission! \$20 Tom's Planner (Web-Based, Free) This image was lost some time after publication. If Gantt charts are a big part of your workflow and project planning, Tom's Planner is an intuitive Gantt chart tool that works just fine as a personal project management tool. Unlike most traditional Gantt charts that display the data once you've entered it elsewhere, Tom's Planner has a strong focus on usability, including on-the-fly, mouse-based tweaking of your charts. You can take it to a test run here, and be sure to pay special attention to the functionality of the right-click mouse button. Stuff (Mac, \$49.95) This image was lost some time after publication. Things are a polished to-do and project management tool exclusive to Mac OS X and iOS. The interface is easy to navigate, keyboard shortcuts are plentiful, and it is extremely well integrated into the core applications of mac like iCal. It's easy to move tasks about, organize them into projects, and associate them with your calendar. All your tweaking in the main application easily syncs with your iPhone, iPad and other iOS devices. OneNote/ Evernote/ Text This image was lost some time after publication. It was quite a neck and neck battle between OneNote, Evernote and basic text recording. Given their primary roles as note-taking and organizational tools - and the diverse nature of the vote spread this week - we took the liberty of rolling them together in one post. is a Windows offering that is usually bundled with Microsoft Office and offers excellent project management through notebooks and their included pages pages Subpages. Evernote is a web and mobile device-based capture tool and the personal project manager that is the choice for many people. If you're already using Evernote to track all inputs in your life, it's relatively easy to use it to manage your projects and organize related tasks and materials. Finally, a significant number of readers have avoided all the bells and whistles of fancy tools like OneNote and Evernote and managed all their projects using basic text documents. Now that we've had a chance to look over the top candidates for best personal project management tool, is it time to cast a vote for your favorite: Does a personal project manager have to share that we overlooked? Let's hear about it in the comments. Have a good idea for the next Hive Five? Shoot us an email tips@lifehacker.com and we will do our best to get your idea the limelight it deserves. (function(){var w = window,amznAsin= (w.amznAsin & amp; w.amznAsin.constructor ==Object) ? w.amznAsin : {};amznAsin[0142000280] = 0142000280;w.amznAsin = amznAsin;})(); Tracking and analyzing your investments can be a complicated and time-consuming task. Between expense ratios, dividends, administration fees, tax planning, and asset allocation, there can be many moving parts to keep track of. But fortunately there are now many powerful portfolio analysis tools that can save you time and headaches. Some tools are free, while others cost money. Some offer deep insights, while others keep the analysis at a higher level. While it's great that there are now many opportunities for investors who want to evaluate their portfolios, it can be hard to say which ones are the best. Don't worry. We've done your homework for you. Keep reading to see which companies made our short list of the best portfolio analysis tools available today. Here are our top 3 picks for portfolio analyzer tools. If you don't use one of these analyzers, we strongly encourage you to check them out for your portfolio planning needs. Personal Capital is a free portfolio analysis tool that provides a mosaic plot chart to help you visualize the composition of your portfolio. It breaks down your portfolio into stocks, bonds, international, domestic and other important categories. Personal Capital made our list of the best portfolio analysis tools primarily because of the huge variety of calculators and charts that it offers. In addition to mosaic chart, Personal Capital can track your net worth, cash flow, and will provide personalized investing recommendations and insights. Although Personal Capital is a free tool, there are a few strings attached. It serves as an advertising platform for Personal Capital's advisory services. When you sign up Once, you may receive a few calls from financial advisors looking for your business. Free: A great tool comes at the best possible price. Excellent visualizations: Although I am not a one Fan of Personal Capital's pie charts, most of their charts and graphs are useful for investors trying to make sense of their portfolio. Helpful recommendations for the average investor: The app makes high-level recommendations about where your asset allocation should have your risk tolerance and age. Their recommendations are not always a perfect fit for everyone, but can be a good starting point for beginners investors. Can receive phone calls from Personal Capital: If you have a six-digit portfolio, expect a few calls from Personal Capital representatives. It can be annoying at first. But after a few calls, you will be able to use the tool for free without being harassed. Minimal insight into volatility: Personal Capital doesn't provide much insight into the expected volatility unless you dig deep into the recommendations section. Portfolio Visualizer is one of the most robust portfolio analysis tools on the market. It specializes in Monte Carlo simulations (which give the probability of a portfolio lasting a certain period of time), backtesting, and various forms of asset allocation analysis. The tool also provides some insight into timing strategies. Portfolio Visualizer is ideal for investors who enjoy tinkering with their portfolio. But you'll also want to be someone who's committed enough to your basic investment strategy that you won't be tempted to dump it every time you encounter a new tool in Portfolio Visualizer. Monte Carlo and Backtesting: Probability-based portfolio analysis is key for people trying to do DIY retirement or college planning. Portfolio Visualizer provides easy to use and easy to understand options for both of these. Robust free plan: The free version of Portfolio Visualizer provides all the main features except export to Excel or CSV files and the ability to import portfolios. But if you just want to understand the tool, the free plan is excellent. Must pay to import portfolios: It costs \$19 per month for a basic subscription to the tool. This includes importing and storing portfolios and exporting to CSV or Excel files. Investors who own lots of individual shares will likely need to upgrade to this option. Expensive set of tools can be overwhelming: With great power comes great responsibility. Despite the educational materials on the site, Portfolio Visualizer can be overwhelming especially for people just getting started. I recommend putting you into basic investment concepts using Personal Capital or Morningstar Portfolio Manager before you dig into this advanced tool. Morningstar is one of the leading portfolio research tools for ordinary investors who want to understand more about their investment portfolio. Morningstar's Manager is a free tool that provides information about stocks, ETFs and mutual funds. The X-Ray tool also provides a deep in each mutual fund or ETF ETF information that may miss. For example, it uncovers hidden fees and shows whether you may be accidentally overinvested in a single share because of a fund's allocation. Easy to understand: The charts and statistics that morningstar provides are easy to understand, even for people who don't have a lot of background in investing. Focused on the right details: Most investors need to understand their asset allocation and the fees they pay. The Morningstar tool contains information about these, but doesn't overwhelm with too much information. Need to manually enter portfolios: Unlike many portfolio analysis tools, Morningstar's portfolio manager cannot connect to your brokerage account. You must manually enter all your portfolio positions. Access to the best tools requires a paid subscription: While Morningstar Portfolio Manager is completely free, X-Ray is part of the Morningstar Premium service, which costs \$199 a year. However, you can try a 14-day trial for free. The portfolio analysis tools outlined above are excellent. But as robust as they are, they won't meet every need. Many times are the best tools to improve your finance tools that help you manage your liquidity. For this type of need, a free app like Mint, Clarity Money or Emma may make more sense. For the spreadsheet inclined, Tiller Money can help with net worth tracking and cash flow management. Or if you want to see how your investment portfolio fits into your overall financial plan, tools like Savology or NewRetirement could be better options. Robert Farrington is America's Millennial Money Expert® and America's Student Loan Debt Expert™, and the founder of The College Investor, a personal finance site dedicated to helping millennials escape student loan debt to start investing and building wealth for the future. You can learn more about him at About Page, or on his personal website RobertFarrington.com. He regularly writes about investing, student loan debt, and general personal finance topics aimed at anyone who wants to earn more, get out of debt, and start building wealth for the future. He has been quoted in major publications including the New York Times, the Washington Post, Fox, ABC, NBC, and more. He is also a regular contributor to Forbes. Forbes.