



How one advisor created a personalized client portfolio with TIFIN Invest

In the following case study, we share how one advisor was able to use TIFIN Invest to help their client invest in a strategic interest area, building trust and showing long-term value in the process.

Help clients invest in their interests.

Anabel* is an advisor who recently acquired the book of a retiring colleague. Her peer had been with some of his client for decades, and Anabel knew that in order to avoid losing these relationships, she had to build trust and solidify her value – quickly.

With her now larger book of business, she also knew she also had far less time for each client, but didn't want to provide any less value for her existing or new clients.

First, Anabel analyzed her tech stack and realized that she could probably be more efficient. She looked into AI-powered solutions that can do "more with less" in order to build efficiency and scale.

Of her tech enhancements, she was impressed by the easy interface available through TIFIN Invest that could help her explore investments across a broad spectrum. Since it could help her search a myriad of investment options in a matter of minutes, she felt that it could help her serve clients faster and more effectively. The proposals she created in the platform saved her valuable time and looked a whole lot better than what she was creating within her small practice, hacking together Excel, PowerPoint and other legacy tools.

One of her early meetings was with Robert*. Robert was second cousins with her colleague, and had mostly been in the relationship because of the family connection. Robert was well-versed in investments and seriously questioning if he should be paying fees for something "he could probably just do himself."

Further, Robert was sick of the "same old thing." He wanted to get involved in his investments and explore areas that were interesting to him and he followed in the news.

One such area was electric vehicles (EV). Robert had recently bought a Tesla, and was fascinated by developments in the EV industry.

This was Anabel's chance. With TIFIN Invest, she was able to quickly use the natural language search engine to uncover various investment opportunities in the EV space including stocks, ETFs, and mutual funds, with the comparison data and insights that Robert needed to feel like her investigation had been thorough.



Discover

Identify investments and provide tailored recommendations based on each client's preferences.



Select

Leverage selector to find and compare investments that may enhance your models and client accounts.



Enhance

Craft hyper-personalized investment recommendations that showcase valuable enhancements across themes, risk, fees, returns, and more in minutes.



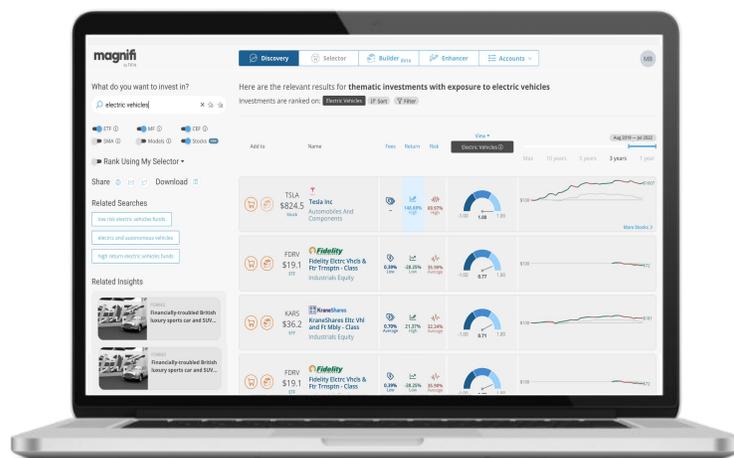
Manage

TIFIN Invest provides integrations with leading custodians, such as Schwab and TD Ameritrade, so you can manage your book of business in less time and with fewer resources.



Anabel was also able to show Robert how she did it, building trust through the transparency of her process, and follow up with a modern and easy-to-follow proposal to get his investments more in line with his interests.

Robert is now one of her most engaged clients, and she was able to use the tool to help her build trust and show value with other new clients. She was also able to use the tool for prospecting, connecting with a new pipeline of potential clients on a digital level. In the end, she showed that the guidance of a tech-powered advisor will always be more powerful than just tech alone.



Optimize Portfolios

Find potential enhancements across risk, returns, fees — and even themes like ESG — for your investment sleeves, models, and client portfolios.



Personalize

Create scoring models to compare ETFs, mutual funds, model portfolios, and SMAs customized to your investment philosophy.



Save Time

Search your entire book in seconds to uncover accounts that have cash to invest, a specific exposure or need rebalancing.

To learn more visit TIFINwealth.com/invest

*A persona created for illustrative purposes.

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