

# Case Study: INVST

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Andes Wealth Technologies enables INVST to bring together their investment model recommendations with clients' risk profiles and behavioral assessments, and create customized, personalized and educational Investment Policy Statements that deepen and enrich client relationships.

## About INVST

INVST was founded in 2003 as a wealth advisory firm affiliated with a broker dealer. In 2016, INVST became an independent RIA and its growth skyrocketed. Since inception, INVST's mission has been to educate, guide and counsel people toward reaching their full financial potential. Specializing in full-service wealth management, INVST helps protect client's life's work, grow wealth, and sustain legacies. Now with over \$800mm in AUM and 20 advisors in multiple locations around the country, INVST is entering its next phase of growth and success.

## The Challenge

"Technology is vital to everything we do," noted Lloyd Easters, CIO for INVST. "We often see ourselves as a technology firm first and a financial advisory firm second." According to Easters, INVST's focus is on how to best integrate client facing technology with back-office systems to create efficiencies, and scale as well as provide an elegant client experience. "As we were building out our technology, we didn't want to have siloed pieces, particularly when it comes to working with clients directly," he said. "So, our challenge was to find one platform that could bring together client and prospect presentation tools, behavior assessments, risk profiling and an IPS to develop our core approach to tailoring their portfolios to their long-term goals and objectives."

At first, INVST struggled with paper processes and inefficient tools. However, once Easters and INVST found Andes Wealth, they were more than delighted to find that all of the key tools to their process were integrated together in a compelling solution.

*“ Before Andes Wealth, our processes were clunky, particularly as risk profiling was done on paper and the whole approach skewed to aggressive allocations. We needed a more accurate assessment, one that was more academically rigorous. Now, with Andes Wealth, it is truly phenomenal what we can do. ”*

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## The Solution

Andes Wealth provided INVST with a comprehensive, integrated technology platform that seamlessly integrated the risk profiling process with behavioral finance applications to automatically generate an IPS that was simple and educational, yet comprehensive enough to document recommendations. “What we envisioned didn’t exist anywhere, so it was fantastic to work with Andes Wealth,” said Easters. “Now we can plug in our models and sync them up directly with the client’s risk tolerance and behavioral assessments, enabling them to visualize how all of this works together. It has provided a huge benefit to clients, which we are seeing in increased loyalty, satisfaction and resulting referrals.”

## The Result

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*Our clients like the streamlined process that Andes Wealth has provided. This has opened up another level of conversation we are now having which is leading to much better and deeper relationships.*

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## About Andes Wealth Technologies

Andes Wealth Technologies is the first company to combine behavioral finance with risk visualization to provide a new way to deliver wealth management. Helen Yang, CFA, founder and CEO, is a winner of the prestigious Harry Markowitz Award in 2011.

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To learn more, visit [www.andeswealth.com](http://www.andeswealth.com).

