



Savant Capital Management

CLIENT STORY

Savant Capital Management

AT A GLANCE

FOUNDED 1986
AUM \$4.4 Billion
STAFF 130 – advisors hold advanced degrees and certifications such as CFP®, CPA, CFA, JD
SERVICES Comprehensive investment management and financial planning
PRIMARY CUSTODIAN Schwab Advisor Services and TD Ameritrade
CRM Microsoft CRM
PORTFOLIO MANAGEMENT Advent Axyx
REBALANCER iRebal

Wealth Access

BENEFITS

CONSOLIDATED VIEW

Comprehensive data feeds from over 20,000 institutions

SERVICE CULTURE

Open architecture ability to integrate with both proprietary and other vendor systems, such as CRM, portfolio management and financial planning

EASY TO USE

Compelling visual display of client's net worth, assets and liabilities enhances communication with client and advisor

OPERATIONAL EFFICIENCIES

Dedicated professionals to help advisors onboard new clients and support their needs

OPERATIONAL EFFICIENCIES

Intuitive interface and ease of navigation enhances client adoption and usage

OPERATIONAL EFFICIENCIES

Powerful aggregation capabilities and onboarding services saves time, provides efficiencies and creates a technology platform for growth and scale

Savant Capital Management is an independent, fee-only wealth management firm dedicated to helping clients work toward maximizing their assets, enhancing the quality of their lives and realizing personal and financial goals. For over 25 years, Savant has provided integrated investment management, financial planning and family office services to individuals, trust funds, retirement plans and non-profits.

Located in Rockford, IL, Savant has a long history of being innovative and forward thinking as they have consistently grown their firm. As part of that focus, Savant has been on the forefront in investing in the key client facing technology to better nurture their relationships and provide an outstanding client service experience.

"Strategically, we need to have a complete view of our clients' entire financial situations," said Brent Brodeski, CEO of Savant. "Not only to be able to provide better advice, but to also help clients understand their entire financial perspective."

Included in this strategic focus is a clear need for account aggregation software, which Savant has had extensive experience with. "We were one of the first in the industry to widely adopt account aggregation systems," said Ellen Poppen, a consultant to and former CIO of Savant. "However, what we found with most systems a few years ago were that they were hard to work with, not stable, not client friendly and were prone to breaking," Poppen noted.

"Additionally, many of the aggregation platforms only had one source for data, which really became problematic for us as we then had to initiate 'one-offs' to get a client's account in to the system that wasn't fed by its data feeds. This issue led to many manual steps and made us initiate a new search for a better system."

As part of that search, Brodeski, Poppen and Savant explored several account aggregation and client portal systems, finding the process to be very challenging with many of those platforms appearing to over promise more than they could actually deliver, having differing components and with some of them not having the full feature set that Savant required in a professional package.

"It was at that point that we came across Wealth Access and were de-



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CLIENT FOCUS

lighted to find a firm that we could work with that actually had wealth management industry experience and knew the issues and challenges we were trying to solve," Poppen said.

"Particularly, the aggregated data feeds from multiple systems and over 20,000 institutions solved our manual 'one off' problem along with the stability of a committed organization," Poppen noted in describing the key factors for selecting Wealth Access.

Other key features that Poppen and Savant needed were the ability to integrate Wealth Access tightly into their proprietary client portal, providing a Savant-branded experience, with the account aggregation solution powered by Wealth Access.

"What really separated Wealth Access in our minds is their knowledge of the industry, attention to client service and working directly with our clients to get accounts set up, if that is what we desired for a particular client," said Poppen. "None of the other platforms had that level of commitment or support, which is truly the difference maker when it comes to client facing technology."

Going forward, Poppen and Savant are excited about the business development opportunities that Wealth Access will create. "One of the first accounts we set up was for a \$10 million prospect who while going through the process was reticent to change advisors because his wire house advisor offered him an aggregation solution he used each day. Wealth Access allowed Savant to provide an alternative aggregation solution that allowed us to eliminate that final objection and close on the prospect.."

"In today's more competitive and complex wealth management environment, independent firms like us need to have these capabilities that Wealth Access provides – our competitors have them, particularly for the larger clients," Poppen noted.

"What makes it even better is that Wealth Access is truly a partner to us – not just a vendor. To be successful, we need that partnership knowing that Wealth Access is committed to continuing to innovate on the platform, keeping us on the forefront and being able to deliver our service promise to our clients."

MORE CLARITY

BETTER PRODUCTIVITY

STRONGER RELATIONSHIPS

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