

# Arlington Family Offices

## Client Story





## Quick Look

FOUNDED:  
1998

AUM:  
\$5.3 Billion

NET WORTH SERVED:  
\$8.3 Billion

CEO:  
Kenneth H. Polk, CPA, CFP®

SERVICES:  
Investments, Financial & Tax Planning,  
Human Capital, Trust & Estate

PRIMARY CUSTODIANS:  
Bank of New York and DTC

CLIENT PORTAL:  
Arlington Client Portal  
(proprietary technology)

CRM:  
Proprietary CRM

FINANCIAL PLANNING:  
NaviPlan

TRUST ACCOUNTING:  
FIS AddVantage

PERFORMANCE REPORTING:  
Greenhill

Arlington Family Offices, a comprehensive wealth management firm with two locations in the American Southeast, provides highly specialized financial guidance to extended families throughout the United States and Europe.

As an independent, employee-owned firm that also includes a private trust company, Arlington Family Offices enjoys the freedom to be selective with its clientele and provide them with individualized and comprehensive solutions.

Since Kenneth H. Polk, CPA, CFP®, started the firm with two client families in 1998, Arlington has grown each year. The clients that select Arlington want an advisor who will keep them informed of critical information, but they also want an advisor who takes ownership of the complexities and communication necessary to ensure that plans and financial structures pass from one generation to the next in a seamless fashion.

We recently started working with a new client who holds all their assets outside of our custody and Wealth Access will collect and unify all of their data so we can view it in a comprehensive way.

**Kenneth H. Polk, CPA, CFP®**  
CEO, Arlington Family Offices

Communication between Arlington and its clients is critical, but the way information is shared within families is also of utmost importance. To provide a simple way for clients to stay connected, Arlington built a proprietary client portal.

The portal gives clients a technology solution that displays their complete wealth picture. From balance sheets that give a bird's eye view of everything they own to their long-term financial plans; the client portal is a solution that enhances relationships.

Due to the complexities that can be encountered when serving multiple generations within one family, Arlington also found that assets could be located almost anywhere. For a firm dedicated to comprehensive wealth management, reporting on those assets, and including them in the client portal amounted to painstaking hours of work. And while most clients custody directly with Arlington, for those that kept accounts and assets elsewhere, Arlington's process for reporting on those assets was less than optimal.

"Before we discovered Wealth Access, we used a manual process where an employee would log into every connection, download spreadsheets if they were available, and then manually build those files into our custody platform," explained Kenneth H. Polk, CPA®, CFP, CEO.

In 2016, Arlington began exploring other options to solve their wealth aggregation struggles. Polk said that Arlington "stumbled across" Wealth Access early on in the search, but once the discovery was made they knew that Wealth Access was the right choice.

A primary reason Arlington chose Wealth Access was because of its open API architecture, where Wealth Access could connect to nearly any data source and then consolidate client data into Arlington's own proprietary systems. The integration with Wealth Access' API streamlines Arlington's internal processes and ensures accuracy of data.

“We had been trying to find out a better way to consolidate our client data. A lot of the technology solutions available could retrieve balances, but we needed a solution that could download and properly code transactions for accurate performance calculations,” said Elliot Robbins, Chief Fiduciary Officer. “Wealth Access has made our data retrieval process much more efficient.”

In its new process with Wealth Access, the Wealth Access platform does the heavy lifting of grabbing data from each connection.

Internally, Wealth Access has given us a tremendous benefit. Transactions download into our custody platform and get categorized automatically. Our team has become much more efficient because of our relationship.

**Elliot Robbins**

CFO, Arlington Family Offices

Now, Arlington's team reconciles accounts weekly as they load them into their proprietary custody portal. And even though the connections have doubled since the time they manually entered the data, they spend less than two days each month working with the data that Wealth Access provides—representing a fifty percent increase in productivity compared to their old process.

The support that Arlington has received from Wealth Access—both through its technology and its “quick to respond” service team—has opened new opportunities for the firm.

“It’s easier for us to go and get information, so we can say yes to bookkeeping engagements at less cost,” said Polk. “We see the need for data unification and more personalized client reporting growing over the next decade, and our ability to serve a family whose assets are in multiple places can grow with it.”

## Wealth Access Benefits



### Remarkable Insights.

With all your customer information together and organized, powerful stories can emerge. Uncover the kind of clear, consistent, and complete views that let you create the experiences your customers crave and your support staff needs to excel.



### Unified Customer Data.

The Wealth Access analytics engine rationalizes and enriches data to help you identify risks and opportunities so you can make right-timed decisions and overcome the systems and silos that hold you back.



### Hyper-Personalized Experiences.

Create friction-free, intuitive user journeys—for everyone. Wealth Access makes it easy to deliver a living balance sheet and frame a complete financial picture tailored to each person or company you serve.

Bring better insights to your firm.  
Schedule a demo to get started.

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