CG Financial Services

Client Story

WEALTH ACCESS

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CG Financial Services

Quick Look

FOUNDED:
1999

AUM:
$2.5 Billion

CEO:
Anthony J. Mazzali

SERVICES:
Business Transition, Retirement Plans, Executive Comp., Employee Benefits, Tax, Retirement, Financial and College Planning, Investment Management, Insurance, Estate Conservation

OFFICES:
Michigan, Virginia, and North Carolina

PRIMARY CUSTODIANS:
TD Ameritrade

CLIENT PORTAL:
Wealth Access

CRM:
Salesforce

FINANCIAL PLANNING:
MoneyGuide

PERFORMANCE REPORTING:
Envestnet

Founded in Michigan by Anthony J. Mazzali and Mark Peter in 1999, CG Financial Services is an independent wealth management company providing services to individuals as well as other financial advisors.

Over the last two decades, CG Financial Services has grown to manage more than $2.5 billion in client assets by focusing their growth on supporting clients with comprehensive and personal services.

“We firmly believe that if you don’t know where you’re going, you won’t get there,” said Mazzali, CG Financial Services’ Managing Partner and CEO. “We work closely with clients to create a Financial Roadmap that shows them where they are, and what they need to do if they want to achieve the type of life they want. Our entire business is about how we can provide comprehensive, complete advice to our clients.”

In its pursuit of providing complete advice to clients, the executive team at CG Financial Services recognized that they needed to take steps that would unify and modernize their digital experience.

In addition to the investors that CG Financial Services serves, the firm also provides services to financial advisors through their TAMP—and that service was in need of a digital upgrade as well.

The firm identified the need to find a partner who could not only provide technology to improve the online experience for its customers, but also make different types of data more accessible and consistent for each client type as well.

On top of that, CG Financial Services needed to integrate its workflow with two of its most critical advisor technology applications, MoneyGuide and Envestnet.

Integrations have the capability to make our advisors much more efficient by reducing the amount of work needed to get the information they want. Wealth Access is helping us realize and implement that vision for our business.

Anthony J. Mazzali
CEO, CG Financial Services

After scoping out the entire wealth management technology landscape, CG Financial Services decided on the suite of solutions from Wealth Access.

But why Wealth Access over anyone else?

At the center of the decision was Wealth Access' ability to develop custom integrations with MoneyGuide and Envestnet to automate post-reconciled performance returns and financial plans. That data could then be synced into the Wealth Access advisor and client portals, which are the digital solutions used most by Capital Asset's clients.

"Wealth Access was the only technology partner that could efficiently and accurately build the integrations we needed to service advisors through our TAMP," said Mazzali. "And by utilizing the Wealth Access client portal, we could unify all the data from our technology partners into a single system."

In addition to the custom integration workflows, Wealth Access was also able to enhance the data services offered by CG Financial Services. With Wealth Access' ability to pull data from almost anyone—including more than 20,000 financial institutions—CG Financial Services could launch an advisor and client portal that included all of a client's assets, liabilities, net worth, and cash flow spending, as well as the critical performance reports and financial plans from CG Financial Services' partners.

"Wealth Access gave us the ability to bridge the gap between performance and planning," said Mazzali. "The integrated portal has given our clients an accessible, integrated, and completely comprehensive experience that fully demonstrates the value they receive from working with us."

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.

wealthaccess.com
sales@wealthaccess.com
866.612.0324