SYCAMORE

CASE STUDY

Master's Advisors

Location	Lancaster, PA
Employees	10
Sycamore Solution	Client Manager
Competitors	RedTail, ACT, EBIX
Live Date	October 2011

A boutique wealth advisory firm providing financial planning and investment management services needed an easy-to-use application that offers a 360-degree view of their clients' holdings and empowers staff to deliver more efficient client support.

Challenge

- Existing environment required advisors to access and manage all their client balance sheet data across multiple applications
- Annual client reviews became too labor intensive, often leading to client meetings and interactions "falling through the cracks"
- Required Minimum Distribution (RMD) tracking was manual and often inaccurate

Solution

- Integrated Sycamore's Client Manager with Albridge and developed several custom integrations to eliminate manual effort
- Developed automated reminders to team leaders of upcoming client review meetings, and provided the ability to assign tasks to the right people and help them properly prepare
- Delivered an RMD module that automatically calculates the RMD factor using IRS tables, and built integration to import and auto-assign distributions to the correct worksheet

Impact

- Increases team productivity and client data accuracy by eliminating manual data entry
- Ensures ALL clients are managed efficiently and effectively
- Frees staff to spend more time serving clients rather than reconciling data across several platforms