

Masters Advisors

Sycamore Client Manager

COMPANY PROFILE



Master's Advisors

LOCATION Lancaster, PA

COMPANY SIZE 10

INDUSTRY Financial Services / Wealth Management

COMPETITOR Redtail, ACT, EBIX

SOLUTION(S) Sycamore Client Manager

FIRST ACTIVE: 10/01/2011

OVERVIEW

Masters Advisors is a small advisor office that needed an easy to use application that provides a 360 degree view of their clients holdings and allows for more efficient client support.

CHALLENGE

- Had to go to several applications to access all of their client balance sheet data.
- Annual Client review were too labor intensive and often 'fell through the cracks'
- Required Minimum Distribution (RMD) tracking was labor intensive and often inaccurate.

SOLUTION

- Integration with Albridge and developed several custom integrations.
- Developed automated reminders to team leaders when Client meetings were coming due and assigned tasks to the right people to properly prepare for the meeting.
- Built out a RMD module that automatically calculated the RMD factor using the IRS tables and built integration to import and auto assign distributions to the correct worksheet.

VALUE

- Eliminates manual data entry and insures accuracy of client data.
- Ensures you manage ALL of your clients efficiently and effectively.
- Staff can now spend more time servicing clients rather than reconciling several data sources.