ADVISOR PROFILE | RIDGEVIEW FINANCIAL PLANNING

Integrated Productivity

kwanti

Ridgeview Financial Planning

Overview

- Independent RIA
- Founded in 2014
- Headquarters in Santa Rosa, CA

Technology Stack

- Portfolio Analysis – Kwanti
- Financial Planning – MoneyGuidePr
- Trading & Reporting - Orion Advisor Tech
- CRM – Wealthbox
- Custodians – TD Ameritrade
- Institutional Rebalancing - iRebal

Ridgeview Financial Planning is an independent Registered Investment Advisory (RIA) firm located in Santa Rosa, CA.

Founded by Brandon Grundy, CFP®, Ridgeview is a full-service, private financial planning and investment management firm, strongly committed to the fiduciary standard to put the interests of clients first.

As part of that client commitment, Grundy has assembled an innovative technology stack to be able to provide transparent investment management services to his growing client base.

Key to that advice delivery is his use of industry leading portfolio analytics platform Kwanti.

"In client meetings I show how my clients are allocated on the iPad with the Kwanti app," says Grundy.

"Because of its elegant design, intuitive interface and prudent use of graphics, clients are able to quickly understand how their investments perform. They get the concepts immediately, which is a big testament to Kwanti's communication capabilities."

Additionally, reports generated through Kwanti help clients better understand their asset allocations.

"The reports from Kwanti are so much easier to read and figure out than other systems, which makes the whole approach user-friendly for us as advisors, and for our clients."

An important component of Grundy's growth story is how he uses Kwanti with prospects. "With a tight integration with Riskalyze, Kwanti is an important part of my process with prospects," notes Grundy.

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"We walk them through the Riskalyze risk illustrations and then push that information into Kwanti for a deeper analysis of their portfolios and a comparison with our models. With the elegant display of Kwanti, prospects immediately see how we add value and are more likely to become clients. We are closing substantial business this way."

Grundy is also a big fan of Kwanti's integration with TD Ameritrade's iRebal system and Orion. "We can easily bring in portfolios from Orion into Kwanti to make model comparisons," he says.

"From there, we can easily push them into iRebal to make the tweaks to ensure the rebalancing is accurately and quickly completed. These three systems work hand-in-hand and make our business a lot more productive."

As an experienced advisor who has used multiple systems over his career, Grundy's advice for other advisors is to make sure that there aren't too many overlaps of systems doing the same thing.

"We continue to examine our tech stack for data integrations and always find that no system does what Kwanti can do. Their dedication to user satisfaction is amazing. Kwanti developers pay attention to details and feedback from users, and it shows in how easy and powerful the platform is," notes Grundy.

"Combined with its very reasonable cost, Kwanti is one of the industry's biggest values out there."

Start your **free** trial today.

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