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ADVISOR PROFILE | JARRED BUNCH

# Personalizing Investment Strategies

# Jarred Bunch

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## Overview

- ▶ Independent RIA
- ▶ Founded in 2003
- ▶ 3 Offices with headquarters in Indianapolis, IN
- ▶ 5 Advisors

Jarred Bunch is a fast-growing advisory firm headquartered in Indianapolis, IN with offices in New Jersey and Florida. Jarred Bunch's mission is to educate, guide and counsel people toward reaching their full financial potential. With a client base spanning nationwide, Jarred Bunch specializes in full-service wealth management offering everything from protecting client's life work, to growing wealth and sustaining legacies. As part of that approach, Jarred Bunch went independent in 2016 to better serve clients as true fiduciaries.

## Technology Stack

- ▶ Portfolio Analysis – Kwanti
- ▶ Financial Planning – eMoney
- ▶ Trading – Orion Eclipse
- ▶ CRM – Redtail
- ▶ Custodians – Schwab Advisor Services and TD Ameritrade

"It was in the best interest of our clients to become an independent RIA so that we could offer more services and advise our clients holistically," says Lloyd Easters, CIO for Jarred Bunch.

"Otherwise if these areas are in a silo, our clients don't have a full picture in order to make the best decisions."

Going independent for Jarred Bunch meant that they had both the opportunity and the challenge of identifying the right technology tools to fulfill their mission and commitment to clients.

"Our approach to finding the right technology was to map out exactly what we wanted to provide to clients, and then make it easy to use for our advisors," said Easters. "Advisors are inundated with many tasks, so the tools we picked had to be powerful, comprehensive and also easy to use in front of a client."

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## Showcasing Personalized Strategies with Kwanti

When it came to portfolio analysis and presentation technology, Easters was extremely pleased to have found Kwanti.

“Kwanti is a phenomenal tool for us and we just love it,” he said. “Kwanti has the flexibility we need to showcase our customized and personalized strategies for clients and prospects. The side-by-side portfolio comparison is critical in order for us to show them our recommendations and then let them make the best decisions.”

Easters describes Jarred Bunch’s investment philosophy as obtaining market returns, but limiting drawdowns and providing downside protection. “We use a combination of active and buy and hold strategies to achieve these objectives and Kwanti enables us to tell this story.”

**From the start, Kwanti is simple and easy to use. All we have to do is plug our portfolios into Kwanti and then upload a prospect’s positions for a side by side comparison,” Easters says.**

“Ultimately the best strategy is one that clients can stick with,” Easters says. “Our approach removes the emotional bias, it is rules based with no subjectivity. As a result, our clients panic less and stick with their investment strategy.”

In order to demonstrate this philosophy and gain commitment, Easters says his advisors are having great success with Kwanti.

“We immediately get the value of the portfolio with key stats right there on the screen such as allocations, drawdowns, recovery periods and more. It helps that Kwanti is just one system that is very powerful visually on the back end, which we use to showcase our recommendations into an easily presentable format.”

Easters notes that Kwanti is key in prospect meetings in order to close business.

“We can show changes on the fly right in front of a prospect or print it out in a customizable way. Our process is to sit in front of clients and prospects with Kwanti open – it is very visual and investors like to see pictures so that they understand what is involved and they can then make informed decisions.”

Going forward, Easters is excited about taking advantage of some of Kwanti’s new integrations, such as with his trading system from Orion Eclipse.

**“We’ve doubled the firm in just the past year and Kwanti has been a key aspect of that growth. It has become such a central part of our advisor’s lives that it is almost like the keys to your car – you use it every day.”**



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