



Testimonials | Advyzon

Hear from our clients why Advyzon is right for advisors.

HOW ONE FIRM SUCCESSFULLY MOVED DECADES OF HISTORICAL DATA

Implementing Advyzon allowed Schaefer Financial Management to upgrade technology without compromise



Overview

Like many RIA's Schaefer Financial Management had been using a legacy technology solution for over 25 years. As technology shifted toward the cloud, their existing solution was left behind. SFM has a long history of proven success for their clients so finding a current generation technology solution that was able to migrate a full data history was critical in their search. These conversations were often littered with limitations on history, which was a non-starter for SFM. They were really looking for a true partner who was willing to work with them to migrate everything from inception.

"Advyzon was extremely collaborative during our conversion process, we were so happy to find a partner willing to make their software work for us instead of needing to change to fit the software."

- Jeff Schaefer, Founder

Company Bio



Location: Centennial, CO

Management (SFM) was founded in 1987 as a privately owned, independent investment advisory firm. The firm is built on the belief that clients are best served by working with a firm that maintains complete objectivity and focuses exclusively on their best interests. SFM works entirely on a fee-only basis to minimize any compensation-related conflicts of interest that would impair the advice we provide.

TOTAL AUM	ACCOUNTS	ADVISORS
\$658M	2,000	6

The Challenge

Schaefer Financial Management has been in business for more than three decades. Being in business for so long, SFM was using one of the very first advisor technology platforms and it had not been upgraded to the capabilities of modern advisor solutions in quite some time. As they searched for a new technology, they knew they needed a partner willing to work with them to correctly convert more than 25 years of data and customer relationship management history. They wanted a technology partner that was flexible and fit their way of working. In addition, they wanted their new technology to be more regularly updated and refreshed with a partner to do the data management and integrity checks.

The Solution

SFM spent years evaluating new technology partners but there wasn't anyone who fit the bill - rather SFM would have needed to compromise their wants and needs. Finally, in 2016, they began their thorough evaluation of the platform. After meetings and phone calls with the Advyzon team, SFM agreed that Advyzon was the right new partner. Advyzon had the capabilities to load their extensive account and CRM histories and the experts in place to collaborate with them. In having a dedicated relationship management team, SFM felt confident that they would be supported through their conversion and beyond.

"We so appreciated the one-on-one nature of working with the implementation team to ensure we had everything right. The Advyzon team worked with us to immediately solve for any conversion issues."

- Becky Aardal, CFP(R)

The Results

Schaefer Financial Management was able to move more than 25 years of full data history over to Advyzon's cutting-edge technology platform. This allows them to use Advyzon's powerful reporting tools and CRM to communicate their value to their clients. During the conversion and implementation, SFM was able to leverage the deeply experienced service team to solve issues in real time. They found a collaborative and diligent partner who would help them mold the software to support their business goals, going so far as building some new features that were needed.

A big benefit to SFM in their move to Advyzon was being able to offload the daily chore of loading data from their custodian, and the peace of mind in knowing that the team at Advyzon would be just as diligent in ensuring accuracy as they had been for so many years. Additionally, SFM continues to enjoy the frequent enhancements to the Advyzon platform.

Advyzon Key Benefits	
Historical Data Conversion	✓
Collaboration Directly with Experts	✓
Daily Data Import	✓
Industry Leading Client Service	✓