



Testimonials | Advyzon

Hear from our clients why Advyzon is right for advisors.

HOW ONE FIRM UPGRADED LEGACY TECHNOLOGY PLATFORMS

How implementing Advyzon allowed TFG Advisors to refocus their efforts on business growth and client service



Overview

Like many firms, TFG Advisors found themselves using legacy technology solutions even though new, cutting-edge tools were now prevalent in the marketplace. As TFG fell under new management, they began looking for alternatives to their outdated technology so that they could consolidate their systems, improve efficiencies, have a better integration with their custodian and provide their clients with an online portal. With Advyzon they were able to find a single technology partner to support their firm and refocus their efforts on client service and growth.

"Advyzon migrated 15+ years of history for us without any issues that couldn't be resolved quickly. The only thing I would've done differently is drop my legacy systems sooner!"

- George Barnhart, Owner/Managing Member

Company Bio



TFG Advisors is registered investment advisor based in Michigan. Their team of six advisors and a few support staff manage just over \$250M in assets4main. Their offerings include personalized life and wealth management advising, goal planning, portfolio design and analysis, tax services, insurance and estate planning.

TOTAL AUM	ADVISORS
\$250M	6

The Challenge

As TFG Advisors' ownership changed, they wanted to upgrade their technology. Their existing legacy technology didn't offer the cutting edge benefits and flexibility offered by many of the newer platforms. They knew they needed a technology partner that would allow them to not only consolidate their existing technology systems, but migrate all of their history. A key challenge for the staff at TFG was that they were spending a considerable amount of time with ensuring data integrity. The billing and reporting at TFG also monopolized the time of the staff to the point they were unable to provide the level of client service they hoped to and focus on growth efforts. The goal was to streamline these back office tasks to allow the staff to have more time to focus on their business and clients.

The Solution

After being referred to Advyzon by their custodian, TFG did an initial online demo, followed by multiple phone conversations and in-person meetings over the course of 10 months to complete their research. The Advyzon team was able to use the information to understand TFG's situation and ensure both their current and future needs would be met.

By switching to Advyzon, TFG was able to accomplish their initial goal of a single technology platform for their practice. Having all of their account and CRM data in a single system gave them the ability to streamline processes and focus more of their time servicing clients rather than dealing with their technology.

"We love everything about Advyzon, but the best thing is the service that they provide. We know that we can reach out any time issues come up and they will be resolved in a timely fashion."

- Tim Atkinson, Chief Compliance Officer, TFG Advisors

The Results

By partnering with Advyzon, TFG has been able to scale their business and provide a better service experience for their clients resulting in increased AUM and revenues.

With Advyzon taking care of the daily import and reconciliation process from multiple custodians and data sources, TFG's accounts are now updated on a timelier basis which allows them to open up client access to their data via Advyzon's integrated client portal.

TFG formerly spent multiple days on their quarterly reporting and billing processes, but by utilizing the tools available within Advyzon, these tasks are now completed in less than a day.

Most of all, Advyzon backs their technology with white glove service. Should an issue arise, TFG is able to rely on their Advyzon Relationship Management Team that facilitates implementation, training, and responsive technical support.

Advyzon Key Benefits	
Automatic Data Integration	✓
Flexible Reporting	✓
Client Portal	✓
Responsive Service	✓