



CASE STUDY

Getting Clients Excited

This advisor believes that investors want to see behind the curtain of their investments – and that with the right technology in hand, advisors who get their clients excited about money will have them for the long haul.

Taylor Wilson, founder and financial advisor at **Greenstone Wealth**, is proud to serve the hardworking community of Forest City, IA. When he set out to launch his own wealth management firm in late 2019, he knew that a modern tech stack would set him apart – so he signed up for Vise and Riskalyze and hasn't looked back since.



THE LEAP TO BUSINESS OWNER

The town of Forest City, Iowa has a rich history. Home to the headquarters of famed RV company, Winnebago, it's a town of hardworking, blue collar families – many of whom have worked for the company for their entire careers. The rapid growth of Winnebago and its stock has gotten the attention of many national magazines. In 1973, Playboy's issue included an eight-page spread titled "O Little Town of Millionaires" where it touted Forest City as having the most millionaires per capita of any other similar-sized town in America.

When financial advisor Taylor Wilson first decided to break away from Edward Jones and start his own Forest City RIA, **Greenstone Wealth**, he knew he wanted to build a business that worked as a partner to the average investor.

Taylor immediately joined the [XY Planning Network](#) to see what kinds of resources were out there. Specifically, he wanted to find a solution to portfolio management, which at most wirehouses, is handled by a dedicated team. As a solo practitioner, Taylor knew he needed to scale.

ENTER VISE + RISKALYZE

It was at an XY Planning Network forum that Taylor first heard of [Vise](#), a platform that harnesses the power of AI to enable advisors to create personalized portfolios of individual securities for every client.

"I was really intrigued by the fact that Vise picked individual stocks for the portfolios. The more I got to know the guys as Vise, the more I bought into the product," said Taylor.

Taylor was equally drawn to Vise's integration with Riskalyze. As part of this integration, Riskalyze customers can use the Risk Number® to create tailored portfolios and view risk analytics.

“The integration of Vise and Riskalyze handles both sides of the coin. Riskalyze allows me to have a conversation with clients that just makes sense. Then I use Vise to actually build the portfolio within my clients’ risk tolerance. It’s a no-brainer.”

PROSPECTING TOOL

Using both platforms is an integral part of Taylor’s client prospecting process, which has been especially important as he’s grown his business in recent months. First, he runs prospects through a Risk Assessment on Riskalyze, as well as the questionnaire on Vise, to get a holistic viewpoint of how the client wants to be invested and their tolerance for risk.

Then, he runs the software in Vise to get a list of securities, and imports those securities into Riskalyze to show the client how their risk level stacks up to how they’re invested (if they are already a client, this information will directly feed from one platform to the other).

“I love using the Investment Policy Statement from Riskalyze to go over what all of this means, what the clients’ goals are telling us, and what the portfolio we generated on Vise looks like,” said Taylor.

“This process makes it so much easier to close deals. When you can show the prospect exactly what you’re doing, it gets them excited and immediately proves your value.”

GETTING CLIENTS INVOLVED

One of the unexpected benefits of using Vise and Riskalyze, Taylor said, is how excited clients get when they know what they’re invested in, and how those investments impact their goals.

“The average investor likes seeing what is in their portfolio – I think it’s our job as advisors to get them excited and encourage them to want to learn,” said Taylor.

“Advisors have a tendency to use a lot of industry jargon and lingo when they talk to their clients – it can cause them to close up and withhold a lot of important information. Riskalyze and Vise put the client and the advisor on the same team.”

Used together, the tools have saved Taylor a lot of time on the portfolio management side of the business and have allowed him to do what he does best: serve as a trusted advisor to his clients.

He added, “If I spent all of my time researching and putting together portfolios on my own, I’d have no time left to actually serve my clients. And none of this would matter if I didn’t have any clients!”

Specifically, Taylor likes showing clients correlation when they start talking about diversification. The tools are incredibly helpful for visual learners.

“I couldn’t do what I’m doing today without Vise or Riskalyze.”

Riskalyze has Made a Positive Impact on These 3 Areas of Greenstone Wealth:



PROSPECTING



PORTFOLIO MANAGEMENT



CLIENT SERVICE

Want to see how other wealth management firms like Greenstone Wealth are deploying Riskalyze? Sign up for a product demo at riskalyze.com/advisors and get to know the power of risk alignment.

Special thanks to Taylor Wilson for his candor and commitment to empowering the world to invest fearlessly.

Riskalyze is the company that invented the Risk Number[®], which powers the world's first Risk Alignment Platform and was built on top of a Nobel Prize-winning academic framework. Advisors, broker-dealers, RIAs and asset managers use the Riskalyze platform to create alignment between clients and portfolios, leverage sophisticated analytics to increase the quality of their advice, automate trading and client account management, and access world-class models and research in the Riskalyze Partner Store — all with the mission of empowering the world to invest fearlessly. To learn more, visit riskalyze.com.



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