

NITROGEN SUCCESS STORY

What's the Value of Nitrogen for Enterprise-level Firms?

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When a 5,000+ team of advisors needed access to instant portfolio insights, one asset management firm turned to Nitrogen's integration focused API — and discovered 4x higher asset flows plus much more.

Compared to non-users, advisors using Nitrogen experienced¹:

2X

Increase in New Appointments

4X

New Asset Flows

2X

Increase in Transfer of Assets (TOAs) from "held-away" accounts

Exploring APIs

After spending over seven years as Head of Client Portfolio Analytics & Performance at one of the largest asset management and investment firms in the world, Jonathan Schapiro is no stranger to enterprise-level scale and operations.

"I ran the performance and analytics area for managed accounts, which also included all retail customers – so those clients that had managed accounts and didn't," Schapiro explains. "And I was essentially looking to up our game on highlighting embedded risk within a client portfolio."

Schapiro's firm needed software that could generate analytics and portfolio insights on demand and at enterprise-level scale, but there was a catch:

"For an enterprise with thousands of advisors, they've almost certainly got a pretty broad set of tools," he says. "And rolling out yet another tool with its own learning curve is a big deal – it requires not only integration with existing tools, but also a lot training and ongoing support."

With that in mind, Schapiro began looking for capabilities that could integrate seamlessly into his firm's existing advisor experience. With the help of Nitrogen's API-provided Risk Number[®] analytics, Schapiro's firm found success (in more ways than one).

Easy Implementation, Exponential Growth

Nitrogen's API provides firms with fast access to risk numbers and upside/downside spread across client accounts. Using Nitrogen's API-generated analytics, Schapiro was able to highlight inefficiencies in clients' self-directed portfolios with a side-by-side comparison to an advisory solution. Highlighting these personalized insights generated immediate success, leading to 4x uptick in wins as measured by flows.

The best part? The API allowed Schapiro's team to take just those pieces of the Nitrogen platform they needed, and then quickly roll those out to more than 5,000 advisors.

"For example, we built a panel in our CRM tool to use the API to highlight top client opportunities for each advisor. By integrating those powerful analytics, we didn't have to



go through the process of ‘Does this entire tool work for me?’ – we could fit just the pieces we needed into our existing experience, and with a material reduction in time to deploy these capabilities. We were very impressed with the ease of implementation and thrilled with the results.”

“An API needs to be scalable and high performant for enterprise firms,” he says. “Can it be used in a real-time online experience with a client? Is it going to be responsive enough to use during client interactions? And the answer from our experience is yes, it absolutely did.”

Key Benefits of Nitrogen APIs

Easy Integration at Scale

Incorporate Nitrogen APIs into your existing systems and immediately access metrics – whether you have 500 advisors or 5,000+.

Content-Based Stats

Measure your organization’s value with impactful metrics via the Risk Number®.

High Volume, High Efficiency

Find the data you need, identify opportunities and save time with our APIs’ high-volume, low-latency response – which can deliver results in less than a second.

Growing With Nitrogen’s Numbers

After deploying the API, Schapiro’s firm measured the results for advisors using Nitrogen analytics versus those advisors that did not. The comparison was dramatic!

Advisors who used Nitrogen analytics had an average 1.6x increase in new appointments, 2x higher transfer of held-away assets and an astonishing 4x uptick in client wins.

Schapiro attributes much of that success to better client engagement through using personalized portfolio insights to create awareness on client opportunities, using the scalable Nitrogen APIs.

“We delivered analytics that identified each advisor’s top client opportunities, all within their CRM experience they live on each and every day,” he says. “Portfolios showing a high Risk number, tax drag, or expense ratios all presented an opportunity for the advisor to reach out and initiate a conversation with the client. And the mechanism to get that information was the API.”

While Schapiro has since left the firm to pursue consultancy work, he still reflects on the Nitrogen API integration as a game changer for helping drive client engagement and conversions and has continued to partner with Nitrogen in developing even more data-driven tools for advisors.

What Can Nitrogen APIs Do For You?

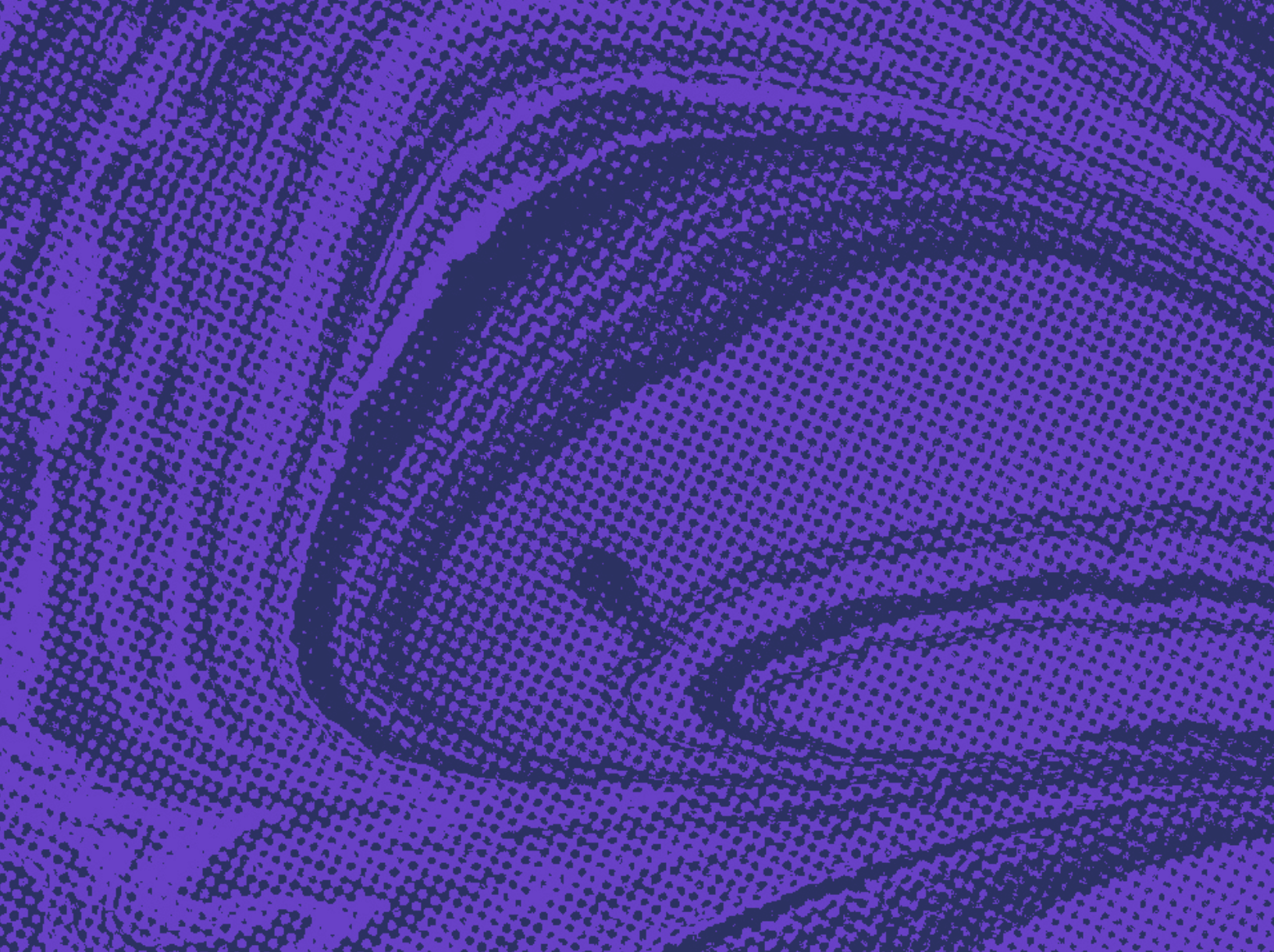
Our high-performance APIs are revolutionizing the way financial institutions engage, analyze and elevate client outcomes. With easy implementation, valuable analytics and high capacity, the days of manually scanning your book of records are gone.

Visit nitrogenwealth.com to learn more or request a complimentary demo today.

Special thank you to Johnathan Schapiro for his commitment to empowering the world to invest fearlessly.

“It’s for those enterprises that say, ‘I’m not going to retrain 5,000+ advisors, and I’ve already got 17 tools on their desktop, I don’t need an 18th tool – but I would love to have that information integrated.’ For those people, the Nitrogen API gives you a way to get that information into their existing experience.”

- Jonathan Schapiro, Founder and CEO of Wealth Management Portfolio Insights, LLC



WANT TO SEE HOW OTHER ADVISORY TEAMS ARE USING NITROGEN?


Schedule a product demo and get to know the power of the Risk Number.


[Book a Demo](#)

This firm has requested to remain anonymous to maintain their competitive advantage, so their name has been excluded.

About Nitrogen

Nitrogen has been revolutionizing how financial advisors and wealth management firms engage with their clients since the launch of Riskalyze in 2011. Today, Nitrogen offers an integrated client engagement software platform featuring risk tolerance, proposal generation, investment research and financial planning tools designed to help firms and financial advisors deliver personalized advice. The company invented the Risk Number®, built on top of a Nobel Prize-winning academic framework, and is the champion of the Fearless Investing Movement — tens of thousands of financial advisors committed to our mission of empowering the world to invest fearlessly. To learn more, visit NitrogenWealth.com.

 Nitrogen
470 Nevada Street
Auburn, CA 95603

 530-748-1660
Fax 530-748-1661

 @NitrogenWealth

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