



NITROGEN SUCCESS STORY

How Mesa Pointe Wealth Uses Nitrogen to Guide High Earners Not Rich Yet (HENRYs)

See for yourself how one firm leverages Nitrogen to successfully engage with a new client base, without sacrificing the client experience across their larger book of business.

The Problem: Understanding the Importance of a Tech Stack

Mesa Pointe Wealth founder and CEO Robert Lehrer admits that for years, he was stuck operating as a traditional wealth management firm. “I didn’t know what I didn’t know,” he admitted.

Back when Lehrer started his firm in 2007, he grew his client base with old-school marketing strategies. He went knocking on doors, printed up flyers, and spent a lot of time and effort trying to convert strangers into clients—and needless to say, he wasn’t a fan of this process.

It wasn’t until he attended an industry conference that he learned what a technology stack was and how it could help him accomplish several important goals like growing his firm, operating more efficiently, and delivering an enhanced client experience.

Leveraging Technology to Attract a New Audience

While attending a wealth industry conference a few years later, Lehrer spoke with a Nitrogen representative and learned more about the role technology is now playing in many financial firms—particularly those with ambitious growth goals.

Lehrer began incorporating Nitrogen into his operations, primarily for its risk tolerance capabilities. But over time, he discovered a new challenge emerging: how to leverage his existing technology to meet the needs of a new generation of investors.

Lehrer’s firm has a minimum amount of assets under management for new clients. Even still, young professionals were inquiring about his services. Although they didn’t meet the minimum AUM, Lehrer and his team wanted to find a way to serve those who fell into this category of “high earners, not rich yet” (or HENRY) investors. From there, the “Henry Project” was born. This initiative helps the firm’s younger clients become more financially disciplined, and Nitrogen plays a crucial role in the process.

Lehrer says he starts by giving these clients (usually 40 and under) a “dad talk,” where he walks them through what their financial journey will look like in the coming years. With Nitrogen’s help, he empowers his young professional clients to envision their dreams for the future, while giving them the tools and resources to invest strategically along the way.

“I expect my clients to take care of their budget, and Nitrogen helps us illustrate to them what that could look like. We use Nitrogen during our first meeting with HENRYs to talk about risk and how to manage it based on their unique circumstances,” said Lehrer.

Tailoring Guidance to Address Every Client’s Unique Needs

While Nitrogen has helped Lehrer and his team address the needs of a new market, he uses the platform with



clients across his entire book of business—regardless of age or AUM. Before clients come for their first meeting, they must fill out a questionnaire that provides a full, 365-degree view of their current financial standings. Then, Lehrer and his team introduce them to Nitrogen and the concept of the Risk Number®.

“We have older clients that score in the 90s and young clients score in the teens. Nitrogen gets us to better understand who they are while helping them understand who they are as well.”

For a monthly fee, Lehrer and his team develop and execute a comprehensive plan based on an in-depth evaluation that all begins with Nitrogen.

“Nitrogen is the genesis of our plan. It tells us more about the client and prospect and drives our conversations to a deeper level that they can understand.”

Simplicity Breeds Trust

As an integral component of every client meeting, Nitrogen is Lehrer’s secret weapon for simplifying complex financial concepts and making them both relatable and understandable for clients of all ages.

Lehrer appreciates just how client-friendly and simple the Nitrogen platform is. Considering he works with clients of all ages and varying levels of tech knowledge, Nitrogen’s intuitive, easy-to-understand reports and analysis are game-changers for building trust and transforming prospects into clients.

“Nitrogen is simple. It comes out with a number that resembles a speed limit sign that people relate to. It’s so relatable, which is a blessing for our older clients who don’t always understand technology.”

Looking ahead, Lehrer is focused on growing his firm gradually by adding new clients each month, and “Nitrogen will be part of accomplishing that goal,” he said.



Join the tens of thousands of advisors who use Nitrogen to align client investments and reach new markets. See how our tools help you bridge the gap between expectations and market realities, leading to more confident, informed financial decisions.

[Click here to see how Nitrogen can elevate your practice today.](#)

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



Nitrogen Wealth