



NITROGEN SUCCESS STORY

How MainBridge Wealth Uses Nitrogen to Convert Prospects and Power Financial Planning Growth

Eight years ago, Chris McAlister didn't plan to become a financial advisor, he simply wanted one.

Searching for someone who would give real advice rather than just sell products proved frustrating. "I couldn't find an advisor who was actually doing planning," he recalls. "So, I took that money, enrolled in Georgetown's CFP program, and realized that this was exactly what I wanted to do."

Today, Chris is a financial advisor with Prudential Advisors and co-founder of MainBridge Wealth, an independent-minded team operating within Prudential. In just a few years, the firm has quickly scaled to \$90 million in AUM plus additional brokerage assets, serving professionals and families throughout the Washington, D.C. area.

Most MainBridge clients are ages 60–70, married, approaching retirement, and have \$1–3 million in net worth. Many work for the U.S. State Department or other federal agencies, where recent political changes and staffing shifts have created uncertainty about pensions, benefits, and long-term job security.

From the beginning, Chris and his partner embraced fee-based financial planning and a transparent, value-first approach. Every engagement starts with education, not a sales pitch. "When we meet a prospect, we don't start by talking about products or accounts," says Chris. "We talk about goals, concerns, and what's keeping them up at night. Then we go to work on their behalf, analyzing their existing portfolios and creating a full review before they even become a client."

That "value-first" philosophy required a tool that could quickly diagnose portfolios, visualize risk, and communicate complex insights in a way that clients could understand. That's where Nitrogen came in. MainBridge Wealth uses Nitrogen as the analytical and communication hub of its prospecting and planning process. After prospects send in their investment statements, the team uploads them into Nitrogen to generate the client's Risk Number® and compare it to their current portfolio's risk profile.

"If a client's comfort level scores a 40, but their portfolio is running at a 60, that's a clear problem," says Chris. "We show them the comparison, the risk they're taking versus what they're actually earning, and most of the time, they realize they're not being compensated for the extra volatility."

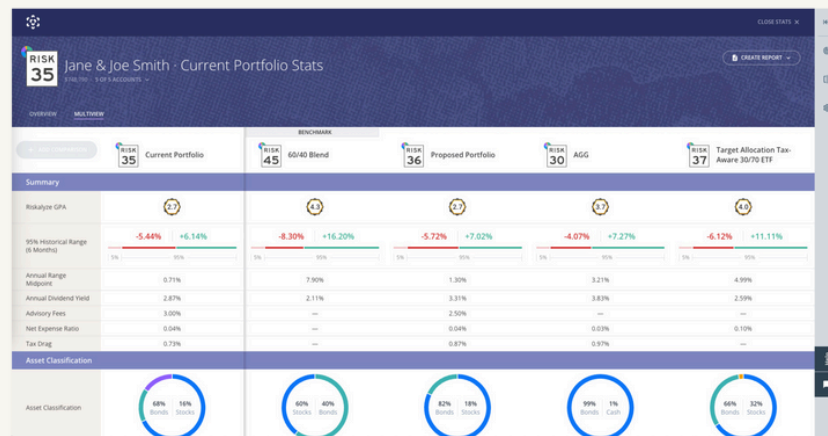
Using Nitrogen's Multiview in Reports and Stats and five-year performance visuals, clients immediately see the gap. "It creates that 'aha' moment," he explains. "Instead of some abstract benchmark, they see their portfolio versus our model with the same risk level, and it's obvious where the gaps are."



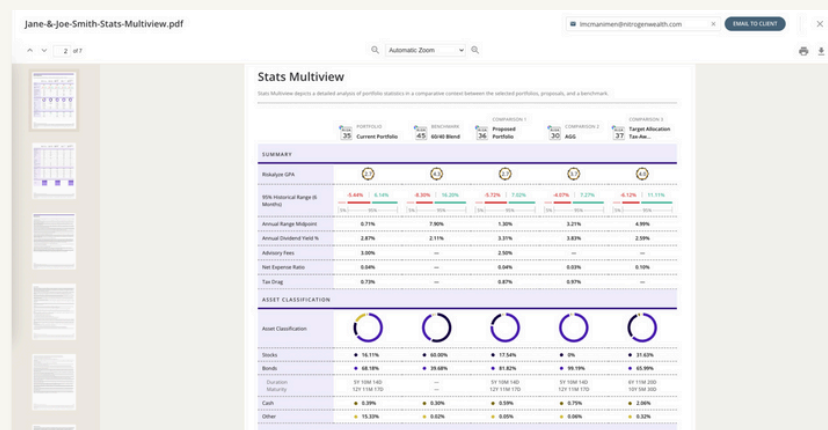
Nitrogen now powers every stage of MainBridge's client lifecycle, from first meeting to ongoing review. The team uses it to re-evaluate client Risk Numbers periodically, especially during market stress or major life changes, keeping portfolios calibrated to current comfort levels. "When tariffs and policy shifts hit the federal workforce, client scores started moving," says Chris. "We ran everyone through Nitrogen again, reassessed their portfolios, and had data-driven conversations that calmed fears. One client who'd refused for years to move his government 401(k) finally understood the numbers and rolled over \$1 million, because Nitrogen made the risk visible."

Nitrogen also supports planning discussions around complex products. "It's fantastic for modeling annuities," he adds. "It helps us show the trade-offs clearly and keeps everything quantitative."

The power of the Nitrogen platform has had a demonstrative impact on the growth trajectory of the firm. Since implementing Nitrogen, MainBridge Wealth has seen 50% year-over-year growth, a dramatic increase in closing ratios, and a record quarter for planning-fee revenue. "Our biggest win wasn't just new AUM—it was the highest financial-planning revenue we've ever billed," says Chris. "Nitrogen directly improves our planning process, and planning is how we measure success."



Stats Multiview



Stats Multiview Proposal

For Chris McAlister, Nitrogen isn't just a risk-analysis tool, it's the bridge between advice and action.

"It's the single best communication tool we have," he says. "Clients see the data, understand the risk, and make decisions confidently. That's what real advice looks like."

**MainBridge Wealth
at a Glance:**

50% YOY Growth
since implementing
Nitrogen

Record High
quarterly planning-fee
revenue

\$1 Million Rollover
from long-term client after
updated risk reassessment

Higher Close Rates
and faster conversion from
prospect to planning client

Quantitative, Client-Friendly
visuals that build trust
and clarity

WANT TO SEE HOW OTHER ADVISORS ARE USING NITROGEN?

Schedule a product demo and get to
know the full power of Nitrogen.

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About Nitrogen

Nitrogen is the leader in AI-enabled, client-facing software for financial advisors. Its integrated platform combines risk alignment, investment planning, tax planning, retirement planning, and proposal generation, helping advisors deliver smarter, more engaging meetings that win business and build lasting client confidence. Trusted by over 30,000 advisors, Nitrogen's technology is built to be seen, enabling advisors to swivel their monitor and guide clients through clear, visual insights that keep them invested in their advisor, fearlessly. Learn more at NitrogenWealth.com.



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