

ANCHORY Upgrades Tech Stack With HiddenLevers

SUCCESS STORY

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Niels Buksik, Founder
Anchory



When Niels Buksik founded ANCHORY an investment advisory firm, he knew he wanted software that not only reflected his investment philosophy, but also gave him a competitive advantage to compete with bigger, more established competitors. But as a one-person RIA, Buksik knew his resources were limited and he couldn't buy every software used by his competitors.

But after seeing HiddenLevers, Buksik knew he found the one.

With its Interactive Stress Testing in action, Buksik saw how HiddenLevers presented sophisticated portfolio analysis through impactful reports clients could easily understand. HiddenLevers also offered built-in prospecting tools, unlike the other software Buksik had reviewed.

"Before I was using eMoney or MoneyGuide Pro, but after I saw how HiddenLevers could accomplish the job of two software, I knew this was the software for me," said Buksik. "HiddenLevers' ability to show how portfolios perform under various market conditions is what makes the software really unique."

Closing First Big Client

Buksik knew HiddenLevers was the real deal after the software helped him close a \$2 million client.

When the prospect came to Buksik, she told him her biggest issue with other advisors was she couldn't understand the investment strategies they presented in Excel sheets or long reports. Without clear guidance, she had invested in the market at its peak, completely missing the drop. Hurting from a huge loss, her previous advisor brushed it off and told her to "stay put" because things would get better simply based on the idea that the market always returns after it falls.

Understanding his prospect's pain of not fully understanding her previous advisor's strategy, losing big, and then being brushed off, Buksik knew could do right by this prospect and give her the proper guidance and reassurance she deserved.

Buksik entered the prospect's portfolio into HiddenLevers to assure her she was in a good place. Using HiddenLevers' portfolio analytics, Buksik could illustrate how various model allocations could yield different results and interactive stress testing also showed the prospect show actual market movements.

By showing the prospect his recommendation in HiddenLevers, Buksik was able to present how his recommendation would perform in multiple macro scenarios, showing the prospect he had a game plan to help her meet her financial goals no matter what the economy threw her way.

"She said she always wanted to understand investment concepts, but never had it presented the ways HiddenLevers did," said Buksik. "HiddenLevers not only helped this prospect understand investing a little more, but also helped build a foundation of trust."

HiddenLevers is the All-in-One Tech Stack

Before HiddenLevers, Buksik had several software in his tech stack, each siloed to its specific function, which created more crossover work.

Inflexible software did not align with Buksik's investment process and general philosophy one should reallocate not just as the client's lifestyle changes, but as the market environment changes. After Buksik found HiddenLevers and saw how easy it was to upload a client's portfolio and stress test it against dynamic market

ups and downs, he knew this was the software to replace all software.

“HiddenLevers does a good job of taking historic debt and putting it into context of the current economic environment, whether that’s a potential Trade War with China or the pandemic” said Buksik. “I’m going to be using all of HiddenLevers’ features because they cover all the bases.”

After recently upgrading to the HiddenLevers Elite subscription, Buksik now has all he needs for every aspect of his business from prospecting to prepping for client reviews.