

# Spotlight on Subscribers: A Client Friendly Tool



**We work with some of the best financial advisors in the world. Thank you Richard for the great feedback.**

Today's spotlight shines on...

Richard Oring, from New Century Financial Group



**Q. How did you get started with HiddenLevers?**

I discovered HiddenLevers when I got frustrated by the current software I was using to measure risk. The software I used wasn't customizable, it was very

generic on what you could do. The other software program limited the scenarios I was able to run and didn't have the ability to really work with SMAs. Another frustration I had while doing research on a replacement was that most other software programs had reports that weren't always client friendly. It was perfect timing on coming across HiddenLevers for my business because I manage portfolios by limiting the volatility and maximum potential drawdown.

### **Q. What have you learned?**

When I signed up for HiddenLevers I was expecting the software to show me the risks associated with current market scenarios. By playing around with the levers in the program I saw how different indicators can affect underlying holdings and overall portfolios.

I also learned how easy it is to optimize your current holdings in a model and minimize the downside risk. It was really quick and simple to shave some points off the risk in existing portfolios.

The biggest thing I learned was that the tools within HiddenLevers were able to explain complex information in a simple format for clients to understand. I really love the proposal report as this has helped me compete against managed mutual fund portfolios. Having the side-by-side comparison with fund prices is a great benefit for me to close business.

### **Q. How have you applied HL's tools to your practice?**

I went from using HiddenLevers as a marketing tool for prospects, to a tool I use for all my existing clients. HiddenLevers makes the client meetings more beneficial because there is more depth to our conversations regarding downside risks resulting from current market conditions.

I am in the process of upgrading to the next level within HiddenLevers to help me manage my whole book of business. Being able to run batch stress tests is a great tool for handling some of the new DOL rules we see coming in the near future.

I'm also an OSJ of a large group and I have been demonstrating this software to my advisers and have received such positive feedback. They are usually amazed on the capabilities of what the software can deliver.

Want to have a similar experience?!

Test drive our system FREE for seven days.