

# Spotlight on Subscribers: Illustrating Your Value



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

Today's spotlight shines on...

David Ortiz from The Financial Chef



**Q. What initially drew you to HiddenLevers?**

A. I found HiddenLevers because my practice is based on risk management, and I liked HiddenLevers because it was a graphical tool that clients could look at as opposed to discussing just a risk number. I also liked the ability to apply almost any "what if" scenario to a portfolio and each individual holding.

**Q. What success have you had with HiddenLevers?**

A. I used HiddenLevers to analyze a large prospect's portfolio and discovered his current advisor was taking more risk than the client was comfortable with. I used the HiddenLevers proposal tool to present an alternate allocation that was lower

cost, and better aligned with his risk and return expectations.

**Q. How is HiddenLevers helping you accomplish your fiduciary duty?**

A. Our firm has always acted in a fiduciary capacity so we are way ahead of the DOL mandate. HiddenLevers helps us illustrate to our clients that we are always acting in their best interest by recommending reasonably priced products that meet their risk and return expectations.

**Q. What value has HiddenLevers brought to your firm?**

A. Our firm is all about transparency and low fees. HiddenLevers helps us demonstrate that to the clients by quantifying what the cost structures are, what the risk is and how things are done in their best interest. As a prospecting tool, HiddenLevers helps me illustrate how someone is being underserved by their current advisor.