

Nvest Financial Group, LLC

Nvest harnesses YCharts' deep data sets and Excel Add-in to experience vast time savings and cost efficiency.

About The Company

Nvest is an independent, boutique financial planning firm with a total of \$180 million in assets under management. The team is composed of seasoned financial professionals with an array of backgrounds, who work together to deliver small businesses and families an unparalleled client experience and exclusive personal attention.

The Challenge

Under the Commonwealth Financial Network, a significant quantity of tools and data are provided to Nvest. Having to use an array of disparate research and market data tools (an incumbent provider for mutual fund data, Google and Yahoo! Finance for equities research, and a number of other disparate sources for financial data), Nvest's President and Founder, Nichole D. Raftopoulos, and Research Analyst, Justin Happ, were motivated to find a solution that had all the comprehensive data they required...in one place.

"I would find myself often monitoring various sources to find news to match quote information," Justin said.

"It was a tremendous drain on my time and I felt like we weren't being efficient in our research process."

Research is an incredibly important element of Nvest's client service. The firm applies various passive and tactical investment strategies to create, manage, and continuously monitor tailored portfolios utilizing individual stocks, exchange-traded funds, bonds, mutual funds, and/or alternative investments. Not having the budget for an expensive Bloomberg Terminal, and requiring more data than what was available in free tools, Justin and Nichole were looking for a solution that could better meet their needs.



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The Solution

A few years ago, with this need in mind, Nichole traveled to the Commonwealth National Conference, and it was there that she first learned about YCharts from Vice President of Business Development Dave Lubnik. After a few discussions and a demonstration to their team, Nvest was ramped up and using YCharts.

As a self-proclaimed “technical analysis freak,” Nichole was thrilled to have all the stock data that she desired in one place. YCharts made it easy for her to create watch lists and gave her quick access to key data sets. Taking advantage of YCharts’ user-friendly interface, Nichole and her team experienced a quick learning curve, enabling them to improve their investment research process.

Nichole relies on Justin to handle portfolio allocations, trading, and investment research, while she’s responsible for relationship-building and client-prospecting. Working behind the scenes, Justin enjoys the time efficiencies offered by YCharts; the platform helps him streamline his reports and provides custom templates so he can swiftly sort through data to make smarter investment decisions on behalf of Nvest’s clients.

“Having all the data in one place saves me so much time,” said Justin. “On a daily basis, we check our equities watch lists and utilize the news ticker for information on stock-specific insights. The fact that there are a lot of metrics is helpful; of these, the predictive search and metrics explanations are especially beneficial, because they give us more talking points when we discuss our data-driven investment strategy with clients.”

In addition to the powerful data in YCharts, Justin is especially fond of the Excel Add-in, an extension of the YCharts tool that allows customers to create a model once, then update it with current market metrics in a single click.

“I use the Excel Add-in to refresh and pull in data for mutual funds and ETFs, and to keep track of what’s going on with specific stocks,” Justin said. “I love the fact that the data updates automatically throughout the day, which is much more time-efficient than manually updating our spreadsheets like we did before.”



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The Results

With Nichole recently being named to the Forbes 2017 Top Women Wealth Advisors List, it’s clear that Nvest is offering high-quality client service.

Being a YCharts user for four years and counting, Nvest relies on the SaaS platform to be the engine that powers the firm’s investment strategy and frees up the team to focus on key objectives.

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"It's a lifesaver for us," said Nichole. "Before YCharts, Justin was spending days updating spreadsheets. We find YCharts to be indispensable, and a tool that provides an incredibly high ROI. The Bloomberg Terminal is far too expensive for a small, albeit growing, office. YCharts is the only solution that has all the information we need, at the right price point."

As Nvest continues to grow, it's critical that the firm operates at peak efficiency to effectively serve its client base. Instead of hiring analysts to help Justin with research, Nvest uses YCharts to keep costs low and do the legwork for Justin.

"YCharts has great customer service," said Justin. "Every time I call or email, I get quick responses. When you are trying to do research, you don't have time to be bogged down in phone queues pressing numbers, and that goes a long way."

"We use YCharts because it's a differentiator for us," added Nichole. "It's a well-kept secret that gives us an edge. We love that it travels with us. We can quickly access the platform on-the-go. The information I need is always at my fingertips."



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Success Made with YCharts

YCharts' cost-efficient, powerful platform provides Nvest with stock data and analysis tools to supplement investment strategies and serves as an alternative to a team of analysts

Need a better way to research investments and communicate your strategy to clients?



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Excel Add-in



Stock Screener



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