

What Can YCharts Do for Your Firm?

See how YCharts helps large RIA firms like **Savant Wealth Management** streamline their workflows and win new business faster:



Facilitate Model Delivery



Savant's investment research team uses YCharts to build and adjust models, as well as conduct due diligence on investment ideas. Those models push automatically to advisors located across the country.

Empower Advisors



Savant advisors can upload a client's portfolio, pull in a firm model, and generate their own proposals from templates created at the firm level, all on YCharts.

Shorten Proposal Turnaround



Savant cut their proposal generation process down to an average of 10 minutes. Proposals are complete with marketing material such as cover pages, team bios, and fact sheets for a consistent brand experience.

Arm Compliance Staff



Savant's compliance team has the ability to implement access controls and report templates at the firm-level, as well as admin access to a report archive.

Consolidate Tech Stack



Savant shifted from many disjointed tools in favor of one cohesive platform capable of investment analysis, portfolio construction, market monitoring, charting, and proposal needs.

Tailored Support



YCharts' dedicated support helped Savant get up and running with custom onboarding sessions and ongoing training for new features such as portfolio stress testing and dashboards for model & fund information.

YCharts is used by 20 of the top 25 Barron's RIA firms, including Savant.

Get in touch to learn about what YCharts can do for your firm.