

Sova / Vantage - Client Prep Virtual Walkthrough - January 02

[VIEW RECORDING - 43 mins \(No highlights\)](#)

@0:00 - Ben Irons (Vantage Financial Partners)

Oh, I share here. Yeah. Yeah, there's. Yeah, on the bottom, it's the air.

@0:04 - Sam Sova

Yeah. Yeah, very comfortable share.

@0:07 - Ben Irons (Vantage Financial Partners)

Okay. So I don't, what can I show? Is there like a limit to what I can show you guys or do you know, I don't?

No, just we want to, we want to day in the life of, you know, when you have to do this.

@0:22 - Sam Sova

Yeah.

@0:23 - Ben Irons (Vantage Financial Partners)

Okay. The day in the life. guess I can walk you through. I'm about to do it here in a little bit.

So I got a lot of taps. Right, Carl.

@0:32 - Sam Sova

I mean, that's really what we need to really understand. That's right. Yep.

@0:36 - Ben Irons (Vantage Financial Partners)

So what I can do is I can, can you still see this screen right here?

@0:39 - Sam Sova

No.

@0:40 - Ben Irons (Vantage Financial Partners)

Yeah.

@0:41 - Karl Simon (getsubatomic.ai)

We see. Okay.

@0:43 - Ben Irons (Vantage Financial Partners)

So do I every time I present something else? Okay. Can I like do a wing, an entire screen? Here we go.

Yeah, you can do a window.

@0:51 - Sam Sova

Yeah. think.

@0:52 - Ben Irons (Vantage Financial Partners)

Can you see red tail here? Yep. Yeah, under now. All right, cool.

@0:58 - Karl Simon (getsubatomic.ai)

So this is what I do.

@0:59 - Ben Irons (Vantage Financial Partners)

So we're opening the calendar for next week on Monday. So I'll come here I'll look and I do the prep for that on that Jesse Andy and I'll kind of look and say okay it's Monday January 6th who's coming to the office.

So Nicole Cords is at 4 p.m. and we like to be a week ahead. So then I'll come to right cap, I'll type in chords and I'll go here and this is kind of this is like use provide a market update just what we've been doing like obviously now we'll do the 2024 of what what's what it's up.

We'll do the thomasal type in here every account that they have. So Roth IRAs, IRAs, solar 401Ks, any outside accounts for our model updates and then continue there.

Here is where I usually live planning notes. So we always we like it to flow and we get all information from different platforms, I'd say. So this is kind of just to hit like a personal touch or like a touch point with them.

How's everything going? If we know something happened, like they had a big procedure, they went on a big trip, they were hanging out with the family.

I'll just throw that in there. It's like a personal touch point. And then we always go like, what's going on in your account?

How much are you taking out every month? What's been distributed year to date? So like the past meetings, it was a lot more.

But now, since it's in 2025, it's not this part won't be very, I guess, wordy as much as it is.

This probably is the best client to show you know that I'm thinking about it. But we always go from like the puzzles withdrawals down the cash flow to see, okay, this is what you need.

Do you need any extra cash flow? This is what you're currently taking. Do you want to continue? Like she's looks like she's maxing and basically it all depends on where you're

at, but I get all of the this right here deposit them withdrawals from well skate. I don't know if I can show you personal stuff, but I will.

I trust you guys. So I'll come in here as I'm working through it and I'll say, okay, I'll go to Nicole's individual account.

It's very time consuming sometimes when you get people with a lot of accounts because you have to summarize like if they have two IRAs for a husband and wife, it's pretty rough.

I can go to time period. I'll do 2024 transaction type contributions and withdrawals and right here it'll tell me pretty much, okay, she's just contributing like \$450 a month.

So then I'll come over here to the Excel, take it out, and then I'll pretty much run the numbers and say, okay, she's contributed \$3,600 year to date.

That's probably gone up now because I think she was supposed to reschedule or not. And basically it's automatically buying the US total stock market, but that's what I do forever.

account. So I guess with somebody who has more accounts. Um, like, this is one of our fair clients right here.

I'll come into each and every account for him and his wife, Christine, like all, like basically all these accounts right here, I'm going in and I'm doing, I'm just doing a deep dive of what they're doing, how much they're taking out.

Is that kind of makes sense for you guys? know it's a lot. Well, this game is where I live a lot too, but also Black Diamond and Red Tail too.

That makes sense. So what's the, so, the wealth state, did we have this on our radar car?

@4:38 - Sam Sova

Or is this new? Yeah, this is new.

@4:41 - Ben Irons (Vantage Financial Partners)

Yeah.

@4:41 - Karl Simon (getsubatomic.ai)

well, is fidelity.

@4:43 - Ben Irons (Vantage Financial Partners)

It's their trading platform that we use. So it's our custodian. So we do all of our money. We do all of our trading.

I mean, if you need to look something, I'm probably going in there for like, I found information, like this is where all of our assets

are stored, we use them and we use Toronto Schwab. We don't, I don't really use Toronto Schwab because that's more so Chris Johnson and Phil, but other than that, I mean, you're gonna find 90, 90% of what causes them in draws of cash a little bit in there.

I don't know if you have any questions about that, but apparently it's kind of blindsided in you, apologize on that.

Yeah, that's okay. So that's what I do for that. Like go ahead, I was gonna say you got any questions on that?

It's pretty important. That's it. Okay, let's hit me.

@5:33 - Karl Simon (getsubatomic.ai)

So yeah, no, this is helpful because, you know, what Sam and I, one of the goals out of this is to better understand where data resides and if you, if systems are being integrated to right capital or everything is manually pasted into right capital.

And in this, in this case, actually, how would you describe the role of right capital aside from the fact that you're preparing for meeting in here?

What would you use for capital?

@6:00 - Ben Irons (Vantage Financial Partners)

a capital, you can do retirement projections, investment breakdowns, like basically you mess around here, you can say, okay, how much can she live on without like, if can she take \$10,000 a month, refresh, and it's going to make the plan go down.

So you, you can pretty much do everything you need in here, and you can just mess around in here a lot and just say, to clients, if you want to take out \$10,000 month, this is your percentage chance.

If you want to take out \$5,000 a month, like basically optimizing the best route for them to take in whenever they're going to retire.

I think she's 50, whatever, so she's got a little time, or 61. But does that make sense on retirement projections?

Yes. So we do a lot of stuff in here. I mean, this integrates from Wealthscape, so it'll basically, it like pulls in there, hopefully, that we usually, so actually, let me back up a little bit.

Okay, so what, yes, what, Platforms do you know that we use like black diamond was red tail? Yeah, right right capital black diamond red tail and fathom are kind of the four that We know about okay, so well so black diamonds So well scape is where everything happens black diamond reads well scape and then black diamond can integrate into right capital Does that make sense?

Okay, I'll kind of flow through each other so we can pull stuff from well scape basically directly into right capital from black diamond It's like kind of you are doing that today Ben or your that's what we do.

That's how we get all of our information into right capital So in other words, you look at wealth wealth scape for this client.

Whatever's in well scape is in there, but it's only values So you can't pull like cash flow from there Okay, yeah, that kind of click I know

It's so much easier for me to just do that explain. So I'm sorry. But and then basically how I figure out what we're going to hit in the meeting.

I mean, we have our meeting notes from last time. So I'll come here. I'll look at usually what we do is Jeremy or make a workflow or Sherry makes workflow.

He said that account only comes here. If they have any notes that they want to hit, and they're meeting, it'll be here.

if not, Jesse's usually pretty good about putting stuff in and I'll come here and I'll find the last notes.

This is what you got.

@8:39 - Karl Simon (getsubatomic.ai)

So planning a retired 63, safe to do so.

@8:42 - Ben Irons (Vantage Financial Partners)

earlier I gave Nicole whenever I planned a trip, video of PhD and artist the game off the top. And then I'll use those notes to just kind of take this wherever I want to go, if that makes sense to.

So I don't know if I'm really helping you here or if you're going to. And you're absolutely helping, I mean, it's going to help us understand where to pull information.

@9:07 - Karl Simon (getsubatomic.ai)

do want to go back to the whole integration comment you made a moment ago. When you say it's just values game pulled in the right capital meeting, the moment in time snapshot balance.

In other words, when you said you can't bring in cash flows from well scape, in other words, you don't see the detail of how the balance changed over time.

That's why you happen to go to well scape to get that. That's right. Exactly.

@9:36 - Ben Irons (Vantage Financial Partners)

So it's basically for this first right here in the cold courts, it has an overall net worth and it updates with the market.

the market fluctuates up, fluctuates down. The values in right capital will change and the positions will change, but it doesn't know, like, so remember how she had a \$150 plant like she contributes \$150 to her brokerage account every month.

it doesn't take that into account unless you put it in right capital. So you can come in here and say in the profile you can go to savings and you could add it in to say taking \$150 a month both but without going in here and noticing that it basically in this account history you're not going to know that.

But the value will go up. Is that also kind of, does that make sense?

@10:30 - Karl Simon (getsubatomic.ai)

And you also mentioned you did a calculation in Excel.

@10:36 - Ben Irons (Vantage Financial Partners)

So I mean that's pretty much how I go about it so I start just like Excel. What do I calculate in Excel?

I don't know the answer to that one. Did I say that? Yeah. Yeah. Oh, yeah.

[@10:54](#) - **Sam Sova**

No, I got it. 150 bucks a month or whatever. Yeah. Yeah, sorry.

[@11:01](#) - **Ben Irons (Vantage Financial Partners)**

My bad. My bad. I remember now. Yeah, so Excel. Well, skip basically produces this Excel sheet right here of all her transactions for 2024.

And I'll just come here and I'll drag straight down. So this way I can give him a total value of what she's contributed for the month or the entire year.

So \$3,600. I would take that. I would come here to write cap. Why is my computer being so slow?

dashboard. That's where I'm going. And I would throw that in. Okay, she's can shoot like this is where all these numbers kind of come from.

So I know she's contributing \$150 a month and then I get that total amount from the Excel. So that way I don't have to go with the calculator and manually type what Oh, twice a month.

It's just easier to do it that way. That's what I do in the cell. But sometimes when you're in this, you have to keep your eye out for like

I guess if you guys were to do this, I mean, you have to look out for which one's a distribution compared to withholding for taxes too.

So I guess I don't even really need to show you that. I can just go back to here. Like on this one, it says deposit, but it would say withdraw.

And then in this section right here, it would say federal tax withheld and state tax withheld. It's not going to give you percentages, but it give you dollar amounts.

And then you just go to ICP and you can see everything you need to know too. So I mean, like I'm trying to kind of down it down, but I've never really had to explain a process to anybody.

kind of just know it, but I mean, this is like IRA transfers. So basically if she had an IRA, I would say, okay, took or he took.

So he netted \$15,000, but I would make sure to include, okay, the gross amount was 19 grand, and he withheld 16% federal, 5% state, but that's what I'm always looking for in the cash flow section in the deposits and withdrawals.

So, again, I hope this is helping you guys a little bit, but basically to summarize, I go to the calendar, I see what meetings are coming up for who, Jesse and Andy.

I'll see, okay, it's Hollander. I'll go here to their accounts. Look, we're good, and then I'll go back here, click on them, see what they want to hit, and I know in the back of my mind it's tax season, and we're going to do their taxes, so that's going to be a pretty big emphasis for them this year.

On this first meeting, I'll come to the meeting notes just to get a basically a reflection of what happened with the last one.

It doesn't look like we're up to date on their meeting notes unless it's with Bob. right, so you can.

to see here. This is what happened at the last meeting, they're good with their allocation. We might, seeing this, I might look into it and say, okay, well, we can look at rolling into the 401k finally.

It's been a pain in the butt with him to try and get it, but you still want to throw it on there to make it, I guess, available for Jesse to hit if he wants.

They know we're going to have an R&B for them both. So these are, if I'm looking at this, I know, first of okay, I'm going to put 401k on there, just basically say we can consolidate it all to one.

I'll put, I'll come here, I know that they need to take an R&D, so I'll come here to well escape, I'll go to their IRA, I'll hit, but also knowing in the back of my mind that he has a 401k out there, this is probably not going to be very accurate because 401k is like almost a million dollars, so I just arm out and you can come here to the plus and you can say, okay, it's going to be \$1,025.

26 cents or whatever, \$1,026, and I'll throw that on the agenda, in, um, yeah, this is a bad example, I can type up, sorry.

See, this is what I mean, if we could hire you, then that'd be awesome, it could be more streamlined.

That's what we're trying to do, yeah. I'm kind of all over the place if you can't tell. It's hard to explain, but it makes it, I promise.

See, IRAs have their own R&D, 401K is their own R&D, so I would, if it were me, this is what I would do, I would probably put the 401K and say consolidation of all accounts, so that way we can have, like, we can view everything and be a little bit more effective, but again, this is where you come to do it, come here and look in, okay, what else do we need in January?

We'll do money to the church, so that's going to be QC's, 10,000 from IRA, and then probably fund the 529s, and then I'm going in here, and this was early in the year.

So it's not up to date with what we were doing, but it's just that's kind of just how I do things and then I'll go to Black Diamond.

This is what we always do to this part. We'll run a portfolio report. For them, which basically just shows their performance for the year 2024.

Oh. So you don't need do you want to see how it's ran. It's pretty straightforward.

@16:32 - Karl Simon (getsubatomic.ai)

So portfolio performance report is always here today. Not always, but since.

@16:40 - Ben Irons (Vantage Financial Partners)

So since the beginning of 2025, we'll do the entire year of 2024. And basically say you're a cop here.

was up 12, 13% over here, but usually we just do. But usually yes, it's just here today. But it doesn't make really any sense if it's January 8th when his meeting is to say, okay.

counts down this in six days. So instead, we'll do a basic summary of last year. But if the meetings are going to fall, then we'll just do from January 1 of 25 to September 19, 2025.

And then to figure out what report I'm going to run, I look at his allocation and I see, okay, it's 54% roughly domestic 73, I think 7525 is where we run an aggressive report.

But you come here and then you just can go okay, calendar either 2024 run. And then I also use this to, this is, I guess, okay, that was too.

So it comes here runs a little report. It's really cute and accurate. And it'll show you what they did last year.

So you can see in 2024, they withdrew \$81,210. So when I'm doing like that account history where I go back and

Total everything up. I can know I know that I have this number in the back of my head to know that everything that I put in here in there Basically in their summary their cash flow.

It has to equal So that's kind of all I got not only this in their client folder because they want because they also down here shows Okay, in 2020 for their return of the time.

So It's pretty much all I got To where you pull down that here before they Yeah, so this is And something called ED reporting Yeah, and you You chose one of the advantage that the aggressive report right and you did because you don't show so he Didn't mark

And we'll hear basically this is how I do it. I do like 75 to 100 percent is aggressive 50 74 percent is moderate aggressive.

And then anything below 50, like 35 to 50 is moderate and anything below that's conservative. That's just kind of a question.

[@19:31](#) - **Karl Simon (getsubatomic.ai)**

He called up the domestic and international equities and knew which range you were in and therefore which report to the current.

[@19:38](#) - **Ben Irons (Vantage Financial Partners)**

Okay, because I know that if they're because equities are more conservative, obviously. So, you know, here, like, okay, it's going to be about a 60 40.

So you do moderate, moderate aggressive. God, it's kind of Yep. But other than that, we also have.

[@19:56](#) - **Karl Simon (getsubatomic.ai)**

Go ahead.

[@19:57](#) - **Ben Irons (Vantage Financial Partners)**

Do you ever. So I know I asked.

[@20:00](#) - **Karl Simon (getsubatomic.ai)**

this and you confirmed it. You run here today. If you're in the fall, you run everything from January 1st, whatever that date is in the fall.

You have usually.

[@20:08](#) - **Ben Irons (Vantage Financial Partners)**

Okay, that's what I wanted to ask.

[@20:11](#) - Karl Simon (getsubatomic.ai)

What scenarios you don't.

[@20:15](#) - Ben Irons (Vantage Financial Partners)

Like sometimes if you see in the notes or in the workflow above, like where I was showing Sam, I don't know if you're watching.

So sometimes here when I come to workflows and I see they don't have the workflow started. Sorry. Usually when we come here.

So when Sherry makes the workflow, if the client has anything that they want to hit, sometimes here, if it says like, I want to look at my investments from the last performance from the last five years, you can come here to run a report that you can get to say, okay, you can do your custom range.

And you can go like if they said two years, you could back this to 2023 and then run it from.

January 1st of 2023 to September 19th of 2025. Does that kind of make sense? Yeah, so it's a custom request from the customer. Usually from the client usually from the client or if the advisor's like hey, this guy's really into my performance from last two years I'll go in and I'll just run one from like again 2023 to now 22 Yep And then there is one more thing that we kind of used to use its retirement projections This is what we use for pitches a lot.

mean I just wanted to show you it.

[@21:45](#) - Karl Simon (getsubatomic.ai)

This isn't as common.

[@21:46](#) - Ben Irons (Vantage Financial Partners)

We don't really use this for a lot of our review meetings This is just something that we use a lot to Just shows you like you can put in all their income.

So like these are all their accounts I need come here and screw around in it and just take data away from this and so

Okay, well, at age 20, 46, you're going to have enough money to retire. I don't, I mean, again, this is super important, but I just wanted to show it to you guys anyways.

@22:08 - **Sam Sova**

Sure.

@22:09 - **Ben Irons (Vantage Financial Partners)**

What about what about your PowerPoint?

@22:12 - **Sam Sova**

Can you go? Can you show us, like you said, you're moving a PowerPoint and like a PowerPoint.

@22:18 - **Karl Simon (getsubatomic.ai)**

If I'll get started, you said you said you use this for client pitches. And yeah, but you said it's not necessarily that important.

But I just want to clarify, meaning for the typical client meeting prep use case or for. So, so we have four or two types.

@22:39 - **Ben Irons (Vantage Financial Partners)**

We have like two types of meetings. Basically, we have review meetings with our current clients and then pitch meetings with clients that we, people that we want to pick from our clients.

Yeah. when we use, we'll use right capital and I'll do basically everything that I showed you before retire up right here for that, because you.

I mean they're not really going to care like okay unless again it's a one-off where the client says hey I want to retire at 65 so I Mean I would say what I where my head goes with what you guys

are going to help us with I would say it's probably more On the side of right capital here not so much retire up But I just wanted to say like for pitch meetings.

This is what we what we used to use We're trying to move away from it, but it's kind of the advisors are comfortable in there.

@23:27 - Karl Simon (getsubatomic.ai)

So that's what we use right now But then we're going I hope I answered your question No, you know, so The client prep meetings is the first use case that I think everyone wants to do Like what I want to be thoughtful about is if there's information that we need to pull in in the first The first phase even if we're not rolling out that use case get it set up so we have it so as a second use case

these client pitch meetings. There will be the next thing up. Yeah. just want to, you know, if it's, is it just this?

No, I'll you a power point that we made.

@24:14 - Ben Irons (Vantage Financial Partners)

But basically when I, I guess the process we take is a little bit different for pitch meetings. We'll have like a information gathering meeting where it's statements, we get to know them as a person.

We get to know who their families are. We know, okay, how much they're making at their current job. Maybe, I mean, they're tax situated.

We get all the information at once. I get all the information sent to me. And then I decipher it.

put it in, I'll put it in right capital. I'll put it into not really black diamond. I'll make notes in red tail.

And then I'll put all this information into a power point. I get that pulled up. And it kind of summarizes everything on one side of it.

We'll get to it right to the next one. I'll move it. And basically in this, it'll, it pretty much brings it all together to say, okay, well, we're gonna hit, we're hitting, is this the one I wanted?

Sorry, we have, we've been pitching this guy for like, okay, six months, so I have like four different hard points for him.

Yeah, I was out with my friends. So, it's very, very long. It's so many different. So you guys knew yours fun at least?

Yeah, it was quiet for me.

[@25:45](#) - Karl Simon (getsubatomic.ai)

How about yours?

[@25:46](#) - Ben Irons (Vantage Financial Partners)

Not as fun as the guy behind you that stayed out till 330.

[@25:51](#) - Sam Sova

Right.

[@25:54](#) - Karl Simon (getsubatomic.ai)

Yeah.

[@25:56](#) - Ben Irons (Vantage Financial Partners)

How about you?

[@25:59](#) - Sam Sova

It was fine.

[@27:00](#) - Ben Irons (Vantage Financial Partners)

it goes to the client like hey this is what we're thinking they're young like 45 to 50 this is what you have to refer to next five six to ten we're looking at this and then the long term is probably retirement and everything else and i'm getting this from the information gathering meeting at the first like at the first meeting that their advisor gave like basically his bill is kind of how i decipher all that and then you go to cash flow i look at you kind of read it yourself i put the savings 401k limits and then again we don't have like a set way that we do it it's just kind of i get it 90 95

percent of the way there i send it to the advisor the advisor comes back with his updates or changes that he wants to make him either do it himself or come back to me to make sense okay and then this is just a snapshot that i use again at all it's just it's all different i don't i can't give you like a

one way that we do things. I would love it because I mean would make my life a lot easier.

But then I also in cashflow I found this in right capital is going through the details as this is what their current savings rate was but to get like really break it down for them to say like hey if we save an extra \$14,000 a month you're saving you're saving like almost two grand in taxes and I see this in right capital and I screenshot it and said okay and then obviously the advisor is all the stuff himself but I just kind of get it there and say like hey how do you want I manipulate it so they can see like okay yeah you're getting your \$14,000 a year towards retirement guess you're going to lock it up how much money you're going to save in taxes and then on obviously on your on-site cashflow you're not wasting that money you don't you know where it's going you're going to throw it into the IRA you're going to address we're going to be aggressive I think because you have I mean in his case he was going to work to settle because he's a pastor so I don't know again this guy's yourself to go

So it's very, very simple. And then this is a projection we got from right capital. Sorry to kind of explain, but the main thing we hit is your projected legacy.

If they do everything right based on a 5% return, they're going to end up with about \$4 million. Again, these numbers are very subject to change, but you just like to put something in front of them that I don't want to say get them excited.

But I mean, they see that number. lot of people are going to be like, holy crap, I like what I see.

And then this is the investment planning that we see. So the short-term accounts are going to be the joint account and the cash accounts and then their long-term, which is what we're going to be more aggressive with where their current retirement plans or their higher is.

And I mean, this is just how it works stuff, it's kind of that moving to this, just what their target portfolio was compared to or what we wanted to get them towards compared to what their current ones.

So they were very heavy and international. So I make sure to point out to Matt, like, hey, we're going to have to reel back on that if we want him to get into the more modern aggressive tool or modern aggressive allocation.

And then the next step, so I kind of just type out everything. I summarize everything from this entire PowerPoint to here and basically say, OK, we're good.

And I always say, if we're going to set up the accounts, and then again, this all goes back to the advisor for editing and blow up, which with Andy, that usually happens.

Jesse's pretty trustworthy of me and I'm kind of still working on. But Andy will, Andy's very different with everything because he's very hands on and has been doing it himself.

So, again, this is the best I got. helped you out a little bit, but I don't really know if you got any questions for me, I'm more than happy to answer.

But that's the PowerPoint that we're moving towards for pitches and bigger review meetings. Yeah, Ben, it's really helpful.

@30:56 - Sam Sova

really do appreciate this.

@30:58 - Karl Simon (getsubatomic.ai)

The one just overall question.

@32:00 - Ben Irons (Vantage Financial Partners)

Because we also have, I haven't used it in a while, but because right capital does everything that Credin does, but I don't know if you've ever heard of like Riscalize or Nitrogen with other firms you can use maybe.

It doesn't hit best right down. I mean, again, I haven't used it in a while because you can kind of see right here.

It gives you everything you need to know. And I think we're trying to move away from that, but that would be another thing.

But I'd say the majority of it is like if I see something I like in my capital, and I think it'll be nice to use, then I'll come here and snip and snip and say, I also have, I guess I could show you the one I was working on today for because I know it's right here, just as a different example.

This one, I mean, it's pretty much all the same premise like the topics to cover. We're going to always take goals and priorities, cash flow investments, retirement, tax planning, but sometimes the snips are different.

@32:52 - Sam Sova

So like, this is everything she has.

@32:56 - Ben Irons (Vantage Financial Partners)

I usually do this one and then this is basically, I put this point in there because I saw, okay, 80% of your portfolio is in cashflow, that's earning 4% in the market due to eight this year.

So, whatever I think is going to help Matt or Adam or Matt, I see your Adam or Andy, I'm going to put that.

It's not, again, it's not a set way, but like these are all from Ray Capital. I mean, this is from the Monte Carlo.

This is produced from the proposed plan that we had for them. They're going to have \$2.9 million. Matt likes this a lot too because it shows where the money can get pulled from when she retires at 60.

Like, we're going to be short, I don't know, 50. Brands are going to have to pull from the town.

don't know if you've ever heard of that unless I'm working, but we, it's like, again, it's all just, well, it depends what we want.

We don't have enough information about her. So, we didn't have enough money to earn enough time to pull them into the whole list of plans.

So, we went with down but we're basically just mixing and matching like pulling pieces from different softwares and putting them all together and that's kind of my job is to get it all together and let them kind of do their job.

I make their life easier but sometimes harder. I hate to ask that. I am knowing you're wrong.
Then will you?

@34:24 - Karl Simon (getsubatomic.ai)

will you mind walking through where you pull these graphics from like just for the specific client in the presentation.

@34:35 - Ben Irons (Vantage Financial Partners)

And I also work just to say this isn't all me. I would say some of it like the presentation and the data reading is a lot of me but getting it in there is also we work with I'm sure that they tell you we work with Focus Forward.

So we work with like a planning team that does like a lot of back office stuff. So I'll send stuff to

His name is Jared and we'll work together on like the planning and prepping of stuff So again, he doesn't do everything that I'm doing, but he will help me with Like getting all this in and he's a pretty smart guy So he likes I enjoy working with him because he has to put it all together to like it's not all just me But I'd say the majority of it is but anyways when I come here like a lot of these steps are gonna be for another time and page So here's that cash flow page that I like cuz it breaks down where all the money's coming from Here's the summary of everything this really gets in the weeds saying like okay, you're taking out this much per year We're invested assets accounts if you want me to slow down just tell me but I'm just showing

@36:00 - Karl Simon (getsubatomic.ai)

like all the different basically pictures or graphs and now just that retire up as you might ask then but do you guys have what's your support agreement with right capital right capital what do you like what do you mean like what what plan do we have yeah it's the the intention of my question is I'm trying to think about how we're from an integration perspective may be able to pull down some of these graphics right and could be back end calls to the system and if you had a content you have like a dedicated account rep or sales rep or you know support

@37:00 - Ben Irons (Vantage Financial Partners)

team at right capital that if you have questions about the system you call we might want to make sure if it's not clear you know directly on their website and through their documentation they make available how to actually pull information of a systems you know automatically yeah I I know we have a I know we have somebody that Jared talks to a lot like he has a problem he goes directly to I don't know our name but like they communicate a lot but again he's like our right capital expert a lot of the things that I see in here I kind of just say hey what do you think of this and show me how to do it but it's just easier for me to be kind of the middleman between the advisor and him so that way I can go straight to the advisor summary but I wish I could give you a better answer Carl I just don't think I'm probably not the guy to know that you could probably talk to Jared and he could give you a better answer but again I that's kind of

to Andy and Jesse to make that connection or do you know I mean? All right cool yep but I mean these are like this is the these are a lot of the snips that I took from the last people it obviously is not the same because it's a different client but and then if you go to end and invest investments if this is where I get like those snips of the sector and style and holdings and everything that's happening so yeah I mean again I hope I hope I you out a little bit and then just

confused that crap on you but not all that was helpful yeah yep so that's what I got say anything else on your own I don't think so well did you actually have something didn't you get Andy do we do we have a what what was your question about right capital again the agreement?

@39:00 - Karl Simon (getsubatomic.ai)

we have with them or you know do you guys hey hey how you hold on let me take down my head phone sorry i didn't know you were on camera you there can you hear us yeah sure yeah yeah my question what you know Ben is showing all this great stuff that he does and pulling information out of different systems including right capital which is you know what he's in that final stage of doing the presentation deck for you know a meeting that you're going to have with a client he's looking through a bunch of graphs maybe pulling ones that are relevant for that meeting my question was do you guys well my intention of this question by the way is to see how we can automatically pull that information that Ben having to manually pull it all down you guys have a support for

ACTION ITEM: Contact Right Capital support rep to inquire about API access for automating data/graph extraction - [WATCH](#)

with a dedicated support rep from right capital, that if it's not clear on how they expose their information through APIs, we could connect with that support person on your behalf and understand.

Oh, yeah, yeah.

@40:15 - Ben Irons (Vantage Financial Partners)

I think we can. I don't know who we've worked with. Yeah, we have somebody direct on, we'll just go to our building person or whoever we did the contract with and then we had like a dedicated person more so when we were getting onboarded and the training and things like that.

But we could start there and get that person. Great. Okay, we can.

@40:42 - Karl Simon (getsubatomic.ai)

Yeah, because it doesn't seem like there should be a way to tap in this sort of like a live feed or update.

Yeah, I mean, it depends upon how mature the app the vendor is with this application, but most applications have a way programmatically the full data.

[@41:00](#) - Ben Irons (Vantage Financial Partners)

Okay. Yeah, mean, that's, yeah, I'm sure you guys are into it, but the main thing with all of these different tools for us and like the tech stack for a firm like us, they all have to talk to each other.

So it has to flow. Otherwise, we wouldn't sign up with right capital to our CRM and then talk to reporting or black them.

ACTION ITEM: Research Right Capital API capabilities for programmatic data extraction to support automation efforts - [WATCH](#)

yeah, so I would assume that that's possible. But yeah, we can, we'll figure that out in that person.

We can try to reach out to them today.

[@41:41](#) - Karl Simon (getsubatomic.ai)

There's no doubt that the systems talk to each other and therefore they have, you know, if you're familiar with the term API or application programming interface, they have them.

The question is, what is accessible to those APIs? Is it the stuff that we want to now call that?