Aequitas Puts Values—and Clients—First

Fair, Impartial, and Honest

Aequitas opened in 2005 with the intent to provide investors with greater transparency and education about the investments we were recommending—and especially to eliminate the conflict of interest between client needs and how advisors are compensated. We serve families of entrepreneurs and executives, as well as small nonprofits and pension plans.

Aequitas is a Latin term for "fair, impartial, and honest." It rings true with our mission to be the "good guys," if you will. We think we differentiate ourselves in four ways: we are independent, we are fee-only, we provide lifetime personal financial planning, and we do not subcontract portfolio or investment management.

Intelligent Presentations

When we started this business, we started with our good intentions. Eventually, we needed to make better, more effective sales presentations to our prospects. We wanted software that could clearly show prospective clients how they were invested today versus how we were suggesting they be invested tomorrow. So we needed, in an intelligent and simple manner, to highlight the benefits of our recommendations so they could be appreciated by novice and more sophisticated investors alike.

When we had the wherewithal to start buying software, we looked at a number of companies and services, and learned about Morningstar® Advisor Workstation℠ Office Edition from looking at Morningstar's Web site.

A Pedestal of Integrity

I've known Morningstar since its beginnings. It represents to me a high degree of integrity, competency, and responsiveness. Because I have known Morningstar for so long and Morningstar has always been such an ethical company, I put it up on a pedestal of integrity. There's also, of course, its wide breadth of data and information resources. And Morningstar operates in a fashion like we do. Its business is independent and genuinely unbiased.

At the end of the day, honestly, Office Edition is vastly superior in its user-friendliness, making it easy to understand how a client is actually invested compared to our recommended portfolios. We can quickly take a client's brokerage statement, load it up in Office Edition, and *voilà*—it highlights the benefits of what we're suggesting over what the client has right now. There's nothing else out there that does this as well as Office Edition.

Polished Communication

Office Edition fits ideally into our sales process and ongoing operations. We can meet with a prospective client and come back looking like an all-star. We can summarize the highlights of the meeting and then Office Edition fills in the information that helps us illustrate what we're talking about.

It's a competitive advantage to be able to assimilate investment holdings quickly into a complete aggregate and see what our prospective clients own, what they are earning, and what they are paying in fees.

Saving Time and Money

Office Edition really fills in that void for us when a client calls and says, "How am I doing, year to date?" Most brokers will say they have to get back to you, but when our clients call—*boom*—performance reporting is at our fingertips, however and whenever we and our clients want it.

As time goes on, we're learning to use Office Edition better and faster. We plan to explore the possibility of using it for its billing capacity and its client relationship management or CRM features. That will literally save us time and money—time on our billing, and money because we won't need separate CRM software.

Joseph Alexopoulos and **Sarah Lewis** are co-founders and principals of Aequitas Wealth Management, LLC, located in Beverly Hills.

To learn more about Morningstar Advisor Workstation Office Edition, call 866 685-4494 or visit global.morningstar.com/Office

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