



CASE STUDY

\$50M AUM Firm, Glasgów & Associates, Improves Efficiency and Client Service

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How John Glasgow Has Improved Efficiency and Client Service with Nitrogen

Based out of Wilmington, North Carolina, John Glasgow has been providing personalized financial planning and investment management for clients since 2007 with Glasgow & Associates. As his business grew and the focused attention he could give to each client got smaller, he knew he needed a solution that would decrease the time he needed to spend on operational tasks like trading. He found it with Nitrogen.

Bringing Together the Qualitative & Quantitative

John Glasgow is a financial advisor who is hands-on with his clients' portfolios. While many great advisors might outsource investment management to a third-party, a large part of John's value to the people he serves is that he individually selects each stock, ETF, and bond fund for the equity and fixed income models he builds.

"It's helpful to me to follow companies so I can understand them and know what my clients are investing in. I feel

that I can do a better job of picking stocks when I'm in that position," he said.

As the number of clients he serves has grown to near 100, and the total number of accounts he manages grew even higher, John found that the time he was spending on portfolio management and trading was starting to take up too much of his day. As management took up more time, John also didn't feel like he was able to give each client the same attention.

"When you get to that number of accounts, you can't trade them all at the same time. There isn't enough time in the day to do them all at once."

Along with a need to improve his trading efficiency, John also saw a need to improve his risk analysis process. Like so many other advisors, his process for determining risk was an informal survey that identified clients as conservative, moderate, or aggressive.

He had a qualitative process, but wanted one that was quantitative.

He found it with Nitrogen.

WANT TO SEE HOW OTHER FIRMS ARE USING NITROGEN TO EDUCATE CLIENTS ABOUT RISK?

Sign up for a product demo at Nitrogenwealth.com/advisors and get to know the power of the Risk Number.

Sign up

This advisor has requested to remain anonymous—their firm and name have been changed.

Nitrogen is the company that invented the Risk Number®, which powers the world's first Risk Alignment Platform and was built on top of a Nobel Prize-winning academic framework. Advisors, broker-dealers, RIAs and asset managers use the Nitrogen platform to create alignment between clients and portfolios, leverage sophisticated analytics to increase the quality of their advice, automate trading and client account management, and access world-class models and research in the Nitrogen Partner Store — all with the mission of empowering the world to invest fearlessly. To learn more, visit Nitrogenwealth.com.

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