Dinergy
Wealth Management

We know that growing a successful advisory practice is a lot of work...and having access to the right tools is important for you and for your clients. That's why Dinergy Wealth Management (DWM) created a technology suite uniquely designed for your practice, stuffed full of custom built features that won't be found anywhere else in our industry.

DWM Confidential Investor Profile

DWM's Confidential Investor Profile (CIP) allows your prospects and clients to confidently connect through a secure web portal to provide you with everything you need to open accounts and help fulfill the Know Your Client obligations.

With state-of-the-art data transfer and storage security, your clients can easily provide and update their personal information as well as statement images.

TD Ameritrade Institutional

All TDAI relationships are not the same. It's about more than just custody.

We designed our relationship with TDAI so you have immediate access to your clients' account information, statements, transaction history, and balances as well as DocuSign and video conferencing capability.

Independent of your AUM, you deserve the best tools TDAI has to offer...along with the confidence that your clients' information will be accessible only to you and our compliance group.

YCHARTS

YCharts gives you access to powerful securities and portfolio analysis tools and lets you create clear visuals to help your clients understand the value your work brings to creating their secure financial future.

Hidden Levers

HiddenLevers provides access to the world of economic and investment data, measuring millions of possible relationships. You can objectively learn how prospcts and clients view financial risk and deliver portfolio stress tests, highlighting potential risks in a portfolio and addressing the "what if..." questions clients ask about the risk in their portfolio.

riskalyze

Riskalyze allows you to capture a numeric measure of a client's risk preference, assess the risk in their current portfolio and consider their risk preference in the design and management of a Dynamic Growth Portfolio. It blends high tech software capability with an understanding of markets and human nature to help you provide your clients with an objective perspective on risk.

ENVESTNET

Envestnet provides you with "Wall Street" caliber account level performance reporting so you can bring data to the table when your clients ask "how am I doing?".

Dinergy Wealth Management
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