

BEING BOLD IN RE-THINKING WEALTH MANAGEMENT FOR SERIOUS TIMES – THE TEGRA118 FORMULA

Tom Burroughes of *Family Wealth Report* talks to Cheryl Nash, CEO of Tegra118 about its thought leadership prowess.

What do you think is the main reason you have reached this award-winning stage? What sort of challenges did you have to take on?

First, and on behalf of my team, I would like to sincerely thank *Family Wealth Report* for recognizing Tegra118 for our thought leadership in Wealth Management. Many from our Tegra118 (formerly Fiserv Investment Services) team grew up in the industry and, for years, have partnered closely with many of the highest performing wealth and asset management firms. Our people have impressive diversity of thought as well as a deep understanding of the industry. We also all have a passion for what we do! Our decision to increase our contributions in thought leadership was intentional. We're committed to accelerating innovation and advancing the wealth management experience and that expertise should be shared. We welcome opportunities to connect in person and onstage with other influencers at industry conferences. And, as a wealthtech provider, I guess we naturally gravitate toward the wonderful digital communications channels and tools that make it easy for us all to connect and information-share such as podcasts, social media, blogging, and increasingly, virtual conferencing. Time is always a challenge...time to write and speak on the topics, trends and social issues we care about requires discipline...but we're all in!

What can you tell us about how your colleagues contributed to this success?

It really is about the passion and commitment of our people. We each draw on our own unique perspectives and experience. We closely collaborate with our clients; their success motivates and drives us to push the boundaries. We also share a commitment to social causes - advocating for financial literacy, supporting our communities and the environment, driving action toward diversity and inclusion in our industry. Our team is truly exceptional and committed to creating a new standard in wealthtech innovation and driving meaningful change.

How have you dealt with the changes taking place in the North American wealth management market and in what way did your award reflect that?

In our industry, nothing is more certain than change itself. We have a long history of providing the core technology infrastructure necessary to support advisory products, including separately managed accounts (SMA), rep-as-portfolio

manager (RPM), rep-as-advisor (RPA), and unified managed accounts (UMA) to serve the broader advisory ecosystem of wealth sponsors, asset managers, financial advisors, and custodians. Tegra118 is focused on making our platform more flexible, accessible, and integrated as the industry changes. As UMAs grow in popularity, our platform has provided advisors and financial institutions with easy access to sophisticated UMA portfolio management and trading capabilities and a streamlined experience. We're continuously evolving to better serve the needs of the wealth management community and it's imperative that we all talk about that evolution and how we're responding to and addressing the changes and trends we're experiencing in our industry.

From whom do you take inspiration, either in terms of people or other organizations, inside or outside the North American wealth sector?

There are so many inspirational people in our industry - which is why I love this industry! I do have a small group of women CEO friends that I am so lucky to have and reach out to for inspiration, for guidance, for best practices and to keep grounded. Noreen Beaman, CEO of Brinker Capital, Lori Hardwick, CEO of Red Rock Strategic Partners and Estee Faranda, CEO of PFS Investments. We know we can reach out at any time to each other for anything. It's not just for inspiration; we have a great support system and network and having that is so important for leaders today.

What sets you apart from your peers this year?

The trends shaping our industry require that wealth management participants rethink the status quo and are willing to be bold in what we say and how we say it. I believe this is where Tegra118 really excels. Our confidence in offering an opinion and perhaps, a unique perspective, has grown. Experience matters! And I think the time is ripe in wealth management for something different - it's time for re-imagining. We must understand our clients' goals while also delivering innovative solutions that will be relevant, provide maximum benefit and support them for all their needs.

What will you do to keep to the standard of an award-winner and push ahead in the future?

We are committed to elevating our thought leadership game to match our industry-leading

innovation! And in our minds, thought leadership is about connecting through lively, challenge-the status-quo discussions. Our unique perspective is informed by a broader view of the fintech space that empowers us to drive change. We will continue to remain connected to our clients and their priorities. We will continue to proactively get in front of industry trends. And we will continue to interact with influencers who share our mission to invite fresh perspectives and seek out opportunities for our clients, the industry and the issues that matter. In this way, you can count on us to maintain the high standards of a *Family Wealth Report* award-winner and industry leader.

What do you hope will be the main consequence of achieving this accolade?

We are beyond proud to be recognized by *Family Wealth Report* and are honored to receive this incredible award! We welcome the acknowledgment and hope it spurs others in our industry to engage more often and share their viewpoints for the advancement and benefit of all.

How will you use the award to raise your profile in the industry and among clients?

Our brand name, Tegra118, is new but as an industry-leading solutions provider for more than three decades, our products are known in wealth and asset management. We continue to invest in and build out our comprehensive technology platform offering goals-based and comprehensive financial planning as well as core middle- and back-office solutions for portfolio management and trading, model management and distribution, portfolio accounting, performance measurement, reporting, and billing services. This award will increase awareness of our mission to deliver powerful, flexible technology solutions that set a new industry standard for how people interact with, manage, and grow their wealth and will help us amplify the social causes that mean so much to us as a company. Together Tegra118! ■