



Personalized Financial Plans 5x Faster

KEYSYS built a **secure web app** that **replaces spreadsheets, auto-aligns portfolios to risk**, and generates **client-ready cash-flow reports** on demand.

Client

Money Matters is a 32-year-old **financial-planning firm** whose veteran coaches deliver **personalized strategies**—helping clients keep more of what they earn.

Business Problem

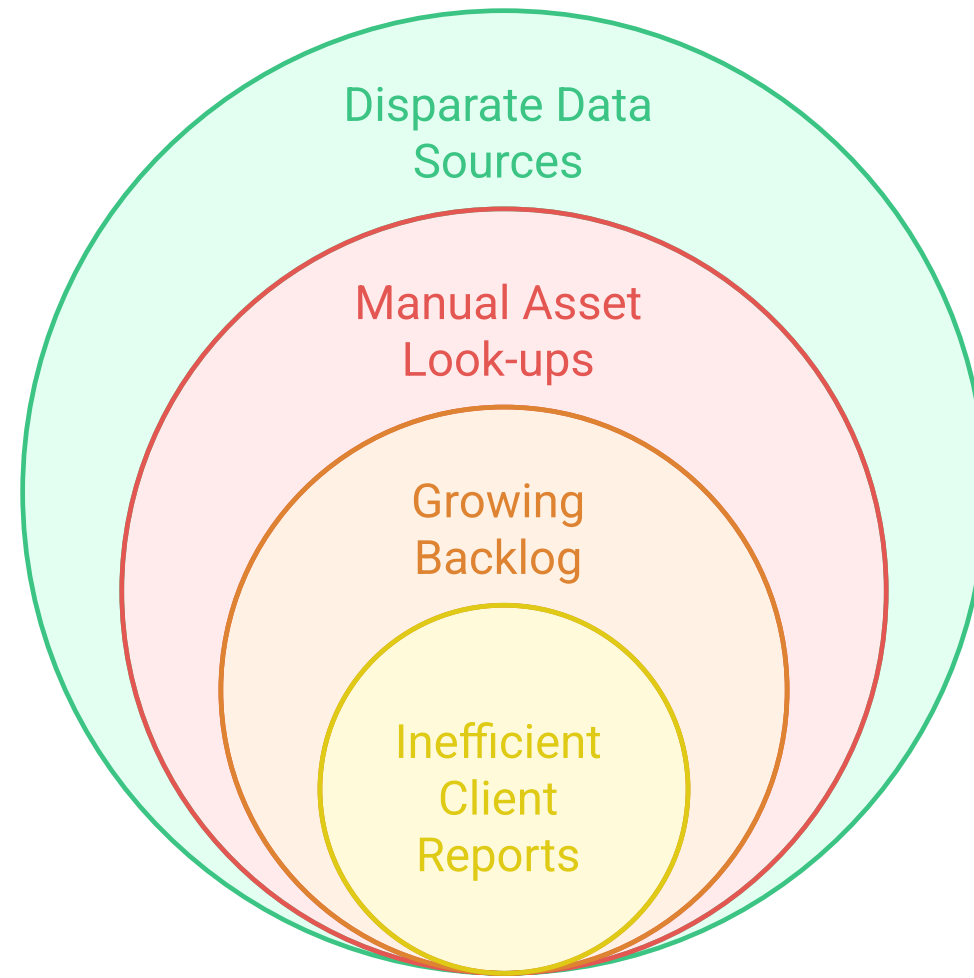
Money Matters planners relied on **spreadsheets, Redtail CRM exports, and manual risk surveys**—an error-prone workflow that consumed **hours per client** and scattered sensitive data across multiple local files. As the client base grew, **compliance risk** and **staffing costs** rose instead of true scale.

KEYSYS Solution

KEYSYS engineered a **cloud-native AWS platform** that performs **automated Redtail data syncs, auto-grades portfolios** with a proprietary **risk engine**, and delivers **branded cash-flow reports in one click**—replacing spreadsheet chaos with **secure, on-demand planning**.

Impact

Money Matters now generates **plans in under an hour**—reducing prep time by **up to 80%**, eliminating spreadsheets, and providing **instant portfolio-to-risk alignment** so coaches **advise instead of audit**.



Before KEYSYS

Disconnected spreadsheets and **CRM exports** forced planners into **manual asset look-ups**, creating a **mounting backlog of client reviews**—an **error-prone, time-intensive process** that **strained staff** and **hindered growth**.

After KEYSYS

A **unified web app** now ties **Redtail data, risk scoring, and cash-flow modeling** into one secure, **AWS-encrypted platform**—automating plan creation in **real time** and **freeing coaches to serve more clients without extra hires**.

