

# Zephyr Platform Case Study: Thrivent

Zephyr   
Informa Financial Intelligence

Thrivent believes money is a tool, not a goal. Driven by a higher purpose at their core, Thrivent is committed to providing financial advice, investments, insurance, banking, and generosity programs to help people make the most of all they have been given.

Thrivent is a membership-owned fraternal organization, as well as a holistic financial services organization, dedicated to serving the unique needs of their clients. They focus on client goals and priorities, guiding them towards financial choices that will help them live the life they want today - and tomorrow.

## Why Zephyr?

Thrivent has been a client since 2020 and subscribes to the Zephyr platform.

Matthew Mast, FIC, MBA is a Financial Professional for Thrivent and is responsible for due diligence on model portfolios, creating current versus proposed client portfolios to show clients where Thrivent can add value, and preparing materials for client meetings.

Mr. Mast first experienced Zephyr at a previous firm. A Senior Advisor colleague used it extensively and, “loved it.” When Mr. Mast moved to take a leadership role at Thrivent, he knew Zephyr would be a valuable addition to support their in-depth due diligence process and their communication with clients. “The functionality and presentation of Zephyr are fantastic. We like that you can create blends, measure them, and put together a very nice-looking, custom presentation that packages our thinking and really shows the value we bring our clients.”

Also, Mr. Mast finds the Zephyr platform the easiest to use in its class. “I knew we needed

Zephyr’s analytics and custom reporting power. But we also like the simplicity of the user interface – it makes it easy-to-use and is a huge bonus.”

When we spoke with Mr. Mast about his experience with sales he said, “Even my experience with sales was impressive. I contacted the Zephyr team before we were 100% ready to get started. Our sales representative was great about checking in with us on a quarterly basis just to see how things were going and if he could help us with anything.” All-in-all, Mr. Mast is happy with his Zephyr experience. “I would definitely recommend Zephyr to others,” he said.

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MATTHEW MAST, FIC, MBA,  
FINANCIAL PROFESSIONAL FOR THRIVENT