

Zephyr Platform Case Study: Charlesworth & Rugg, Inc.

Zephyr 
Informa Financial Intelligence

Charlesworth & Rugg, Inc. bridges the gap between the wealth management practices of the past and of tomorrow. While their roots date back to 1976, they are an intergenerational advisory firm that has modernized for the future. They build cost-effective portfolios rooted in academic theory and tested with practical, real-world experience. Charlesworth & Rugg's team's backgrounds and expertise range from academia to institutional arenas in the areas of mutual funds, ETFs, private equity, real estate, private banking, corporate services, financial planning, and fixed income.

The members of Charlesworth & Rugg believe there is a better approach to wealth management that can be achieved when portfolio management process is thoughtfully combined with prudent financial planning.

How We Help

Charlesworth & Rugg has been a Zephyr client since 2016 and subscribes to the Zephyr platform.

Cyrus Amini, Esq., CFA, Chief Investment Officer & Chief Compliance Officer, co-manages the investment selection, research, and asset allocation decisions.

As a midsize RIA, Charlesworth & Rugg leans heavily on their research and manager due diligence to make the most informed decisions. The ability to perform in depth research in-house is critical. "Having a tool that allows me to look at the numbers in a one-stop-shop way is invaluable," Amini said.

Charlesworth & Rugg also needs the ability to package their thinking into fully customizable, easily

digestible presentations. Amini said, "The Zephyr reports are easier for our clients to engage with."

Overall, Mr. Amini has been very happy with his experience with Zephyr and would recommend it to others. "My partner and I looked far and wide at different solutions in the marketplace. For advisors that need to focus on investments, this is the platform to rely on."

"The truth is, I don't know what I would change about it," he said. He added, "The service has always been unbelievable. I always come away with the help that I need."

CYRUS AMINI, ESQ., CFA, CHIEF INVESTMENT OFFICER & CHIEF COMPLIANCE OFFICER AT CHARLESWORTH & RUGG, INC.