



Client Success Story **South Bay Financial Partners**

Racing Ahead of the Competition

"In Morningstar Office, I can slice and dice my clients' portfolios any way I want with a click of a button."

Tara Unverzagt

Founder and Chief Advisor

Company

South Bay Financial Partners

Product used

Morningstar Office

Use cases

Portfolio Management
Research Insights

Industry

Financial Services

The Challenge

Whether it's cycling or building her practice, financial planner, Tara Unverzagt, pushes her limits. She wants to grow her book of business while advising each client on their day-to-day financial decisions.

The Solution

An all-in-one portfolio management tool to fuel an expanding practice. As she races ahead, Tara uses Morningstar Office to power her financial advice.

"Life-enhancing experiences always happen when I'm outside my comfort zone."

Beyond the Comfort Zone

Unverzagt knows something about grit. Around 20 years ago, she was looking into enrolling her son for training at the local velodrome, a track for bicycle racers.

She found her riding club offered training sessions for adults, and soon she was hooked. She trained on Friday nights at the velodrome and piled on training miles on the roads around Southern California. Then she started to race.

All the riding led Tara to the 2013 UCI Masters Track World championships in England, where she won four gold medals and a silver in her age class.

One Tool, Endless Possibilities

Tara prefers investing in individual stocks, following about 140 core equities. In uncertain times and volatile markets, she looks for new opportunities and well-priced stocks.

It's easy to forget about bonds when interest rates are low, but Tara believes that they have a place in most client portfolios.

With Morningstar Office, Tara eliminates tech overload with one bundled solution for her research and portfolio management. She can review independent data on over 300,000 investments to help her screen equities and bonds. Then she can dig into analyst research, adjust asset allocations, and monitor the markets without leaving the platform.

Morningstar Office allows her to thoroughly analyze client portfolios, including running reports on asset allocation, industry diversification, and bond ladders.

Focus on Client Conversations

Tara learned strong values about money at an early age. She grew up in a house where money was talked about openly.

“It was transparent,” she says. “We had regular conversations about investing and investments.”

Tara’s mother was a financial planner in the 1970s, when the field was new. Tara assumed the majority of her mother’s clients in 2017. Today her mom has retired, but the two still discuss investments and review family portfolios together.

Tara works with many people who feel anxiety, shame, and fear around money and investing. As a certified financial therapist, she helps clients get unstuck and strengthen their financial well-being.

Tara entrusts the Morningstar support team with back-office administrative tasks so she can focus on building relationships.

She stays on top of client accounts with daily imports from Charles Schwab and TD Ameritrade, the two platforms she uses for trading. She also taps Morningstar ByAllAccounts to access data from heldaway accounts.

“With Morningstar Office, I get all the good things I loved about my previous portfolio management tool, plus more accurate and robust reports, integration with my CRM and financial planning software, and investment research built in.”

With all her new clients, Tara doesn’t have time to train for another world championship, but she still manages to ride her bike now and then. It’s fitting that “Unverzagt,” her married name, means “undaunted” in German.

Ready to See for Yourself?

Remake your workday with practice and portfolio management software.

Visit: morningstar.com/products/office

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