Advanced portfolio optimization.
Better client outcomes.

a message from our founder

The time is now! For your business to survive and thrive, you must embrace technology. I believe the combination of a top-notch tech stack paired with your human touch and advice will be required to keep and compete for new clients. The advisors who blend man and machine to become a "cyborg advisor" will be those that continue to experience dynamic growth in the years ahead.

Cy is designed to create bespoke portfolios for clients based on their benchmarks for loss and return. Cy is short for "Cyborg," a more advanced and powerful concept than other robo offerings. We feel Cy is an ideal partner for advisors who want to compete effectively in today's digital financial services landscape. Cy's investing technology is designed to help advisors take a strong step forward in providing value-added investment advice.

Don Schreiber, Jr.
Founder, Chief Visionary Officer

meet Cy

Starting with a broad universe of more than 30,000 mutual funds, ETFs, and SMAs, Cy analyzes millions of data points to curate a select list of passive, active and alternative managers who have demonstrated strong risk-adjusted returns. Then, Cy runs thousands of portfolio simulations to find the maximum mathematical advantage of non-correlation and covariance in an effort to build wealth more efficiently.

Cy develops a cash-flow and asset based required rate of return from client inputs for assets, income, current age, retirement age, inflation, tax rate, income need, and life expectancy. The client's required rate of return becomes a personalized benchmark for portfolio design.

During bear market cycles, investors focus on capital loss because this is the clearest indication of risk. Cy's approach helps the advisor and client to identify their targeted "loss" benchmark. The loss target becomes the the benchmark for risk in portfolio design and can be used to anchor client expectations and behavior.

We believe the key to investment success is to help clients stay comfortably invested in both bull and bear market cycles.

millions

of data points analyzed for
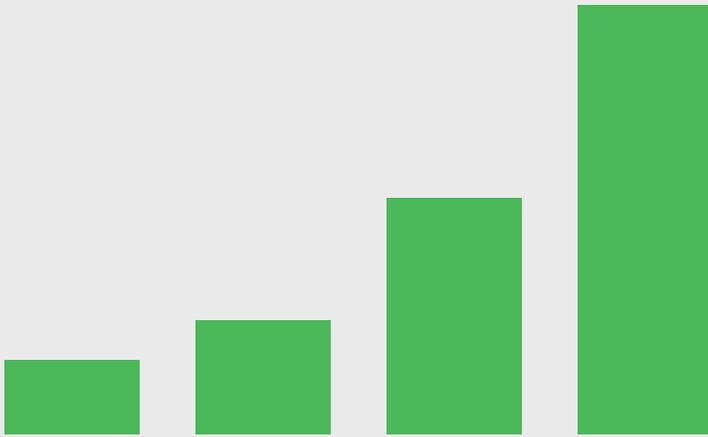manager selection and
ranking

thousands

of portfolio simulations to arrive
at the optimal blend of
managers that aim to produce
the targeted outcome

hundreds

of years of combined industry
experience of the people who
built Cy

growing advisor adoption

Advisors love Cy because it's different from other robos. How?

With Cy, the advisor remains a critical part of the wealth management process. We empower you to craft custom-tailored portfolios solutions to help meet each of your client's needs.

Join the Cy revolution. Become a cyborg wealth advisor today.

about the technology

Cy is designed for advisors to work more efficiently with clients, provide them with more powerful information, and empower them to make better investment decisions.

Cy's proposal generation system simulates how a recommended portfolio would have performed over the last two major bull and bear markets. In addition, you can instantly model the effect of income withdrawals on the recommend portfolio.

An integration with DocuSign makes getting your client on the right path quick and seamless. You will no longer need to overnight or fax paperwork. With e-signatures, advisors can email documents to clients for signature anywhere and on any device.

Cy is presented in an intuitive and non-intimidating way, without jargon or opacity. Cy gives advisors a tangible value proposition that can easily justify fees while enriching each client's investment experience.

sleek user experience

custom portfolio design

We help you meet your clients' needs. Apply powerful analytics to build custom portfolios in minutes, freeing you up to spend more time on valuable advice.
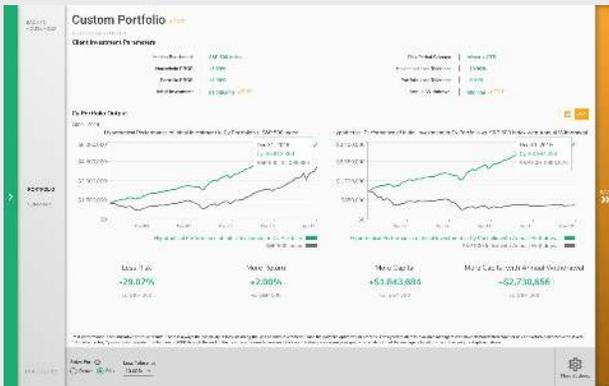
model withdrawals instantly

For retiring or retired clients, Cy can illustrate the effect of income withdrawals against portfolio values to demonstrate portfolio success or failure.
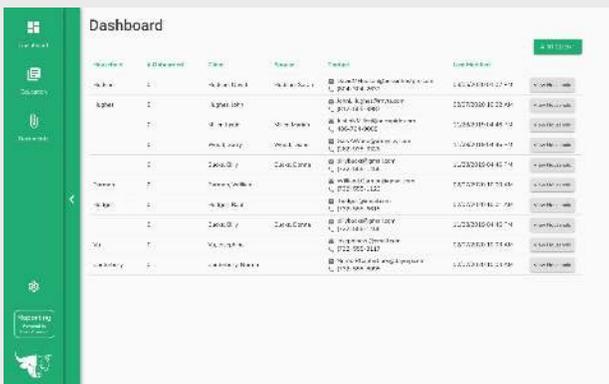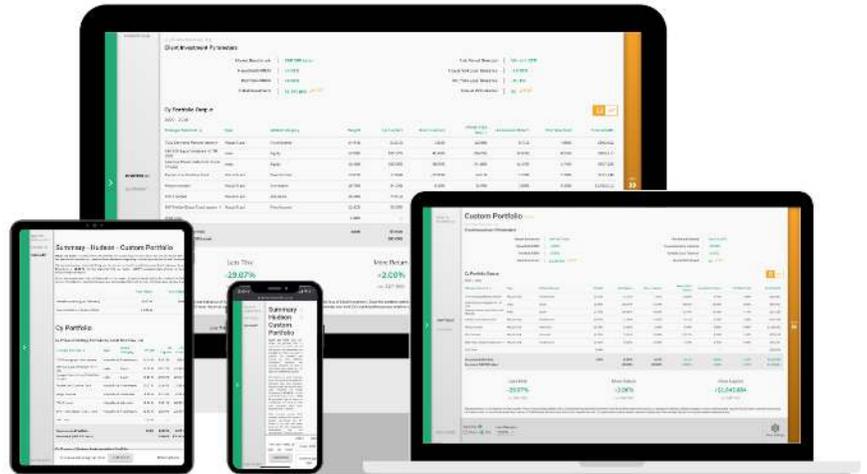

user-friendly dashboard

View client accounts at a glance using the Advisor Dashboard. Here, you can see a list of client households, account status, number of proposals generated, and a summary that can be easily saved and exported.

what's next for Cy

The code that powers Cy is fast, scalable, and simple. This allows a wider range of integration possibilities as Cy evolves into the future.

The platform can be customized for institutions. Proprietary products can be optimized into a single model portfolio for targeted loss or return. Cy can also blend a list of best third-party managers with a firm's proprietary products.

Cy can be white labeled to support corporate branding and can be API integrated with in-house systems to promote maximum efficiency.

Cy will easily integrate with other TAMP technology to provide an end-to-end wealth management platform. The vast library of portfolio outcomes Cy generates can also be used on any model delivery program.

The roadmap for future Cy integrations is incredibly rich, robust and multidimensional. Namely, multi-custodial integrations, billing, reporting, digital banking, CRM integrations, family office planning, and business valuation solutions are already in the pipeline.

We believe Cy is poised and positioned to become a major player in the digital wealth management revolution.

Visit **investwithcy.com** to get started today!