Credent Wealth Management

Edison Byzyka, CFA, Chief Investment Officer | AUM: $2.7B | Type: Fee-Only

Credent Wealth Management is a fast-growing fee-only firm on a mission to give clients the "best options the industry has to offer" as a true independent. A key driver of the firm's growth is their strategic use of technology.

"Our goal is not to be a technology company, but to partner with the best in tech and implement that technology in a very efficient way," said Chief Investment Officer Edison Byzka. "For us, it's important to be at the forefront implementing the next best thing for our clients and our firm. Orion and DPL have been a huge part of that."

Transitioning from Hybrid to RIA

The firm discovered DPL as they began transitioning from hybrid to fee-only during the pandemic. With a book of annuities on the brokerage side, Credent leaned on DPL's technology and team to "lift the burden" of analysis as they evaluated and transitioned annuity contracts to fee-based solutions.

"DPL was a very unique and timely option for us," Byzka explained. "We really appreciate DPL's objective annuity review process. They don't shy away from saying, 'This doesn't make sense to transition to fee-only — don't touch it.' That's pretty powerful to go back to the client with a recommendation knowing you ran an objective process based on data and analytics."

Fueling Growth with DPL + Orion

Since adding DPL to its tech infrastructure, Credent has doubled in size and continues on a steep growth trajectory. Byzka appreciates DPL's growth as well, noting the firm's expansion of products for principal protection and guaranteed income that deliver "tangible value for our clients."

"The beauty of the partnership with Orion and DPL is that both firms are constantly innovating," said Byzka. "Our advisors really value the deeper Orion integration and availability of annuity contract management data and functionality both through the Orion platform as well as DPL's Advisor Dashboard."

Combining the 'Best in Tech'

In Orion, "we found a partner that is not going to constrain us and lets us build the structure the way we want to support our advisors, whether they are fee-only or still hybrid. And, the beauty is, DPL fits right within that. It's been a great solution for us."

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DPL + Orion

DIRECT ACCESS: With direct access via single sign-on from Orion, advisors can seamlessly expand their offering to include annuities and insurance, strengthening their fiduciary process with scalable, fee-based solutions.

DATA & REPORTING: With robust data feeds from DPL to Orion, advisors can view position and transaction data, enabling the management of annuity assets within their Orion desktop.

To get started, contact us at orion@dplfp.com