



SIDEDRAWER™

## Case Study

# Meet Rolf Issler from Issler Group

Financial & Business Growth Strategies for Professionals and Entrepreneurs

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Rolf Issler, Issler Group's founder, was kind enough to sit down with us to develop this case study and discuss how his company and clients have benefited from using SideDrawer.

## Who is Issler Group?

Based in Kelowna, British Columbia, Issler Group Management & Consulting Inc. is a financial management and consulting firm that has been providing customized financial plans, advice and guidance to professionals and entrepreneurs in all stages of life, as well as business planning and growth strategies to independent contractors and small business owners. More and more, people are wanting financial stability whether they're young professionals just starting out, or someone who's in their later years.



## Who is Rolf Issler?

Rolf Issler is the founder of Issler Group and a financial and business advisor living in Kelowna, British Columbia. He entered the financial industry in 2005, with one of Canada's largest financial services firms where he grew to manage a team of advisors and provided training to brokers and advisors from all parts of the country. He became acutely aware of the needs of clients from a wide variety of situations.

In 2018, he decided to launch his consulting firm, Issler Group Management & Consulting Inc., so that he could provide even greater support to his diverse client base. An area that he saw a developing need was in providing business advice to his small business owner clients. That led him to the University of British Columbia, where he graduated in 2021 with a Bachelor of Management (honours) degree.

It was during this time at university that he discovered that the next generation of young professionals did not have access to financial literacy and planning services. The desire to have a material impact on this generation of professionals is what motivated Rolf to explore alternative service models and has developed planning options specifically for his clients in their 20s and 30s.

## Personal need started the discovery

"One day, just after we moved, my wife asked me where our life insurance policies and important documents were. They're stored in a box somewhere," Rolf replied.

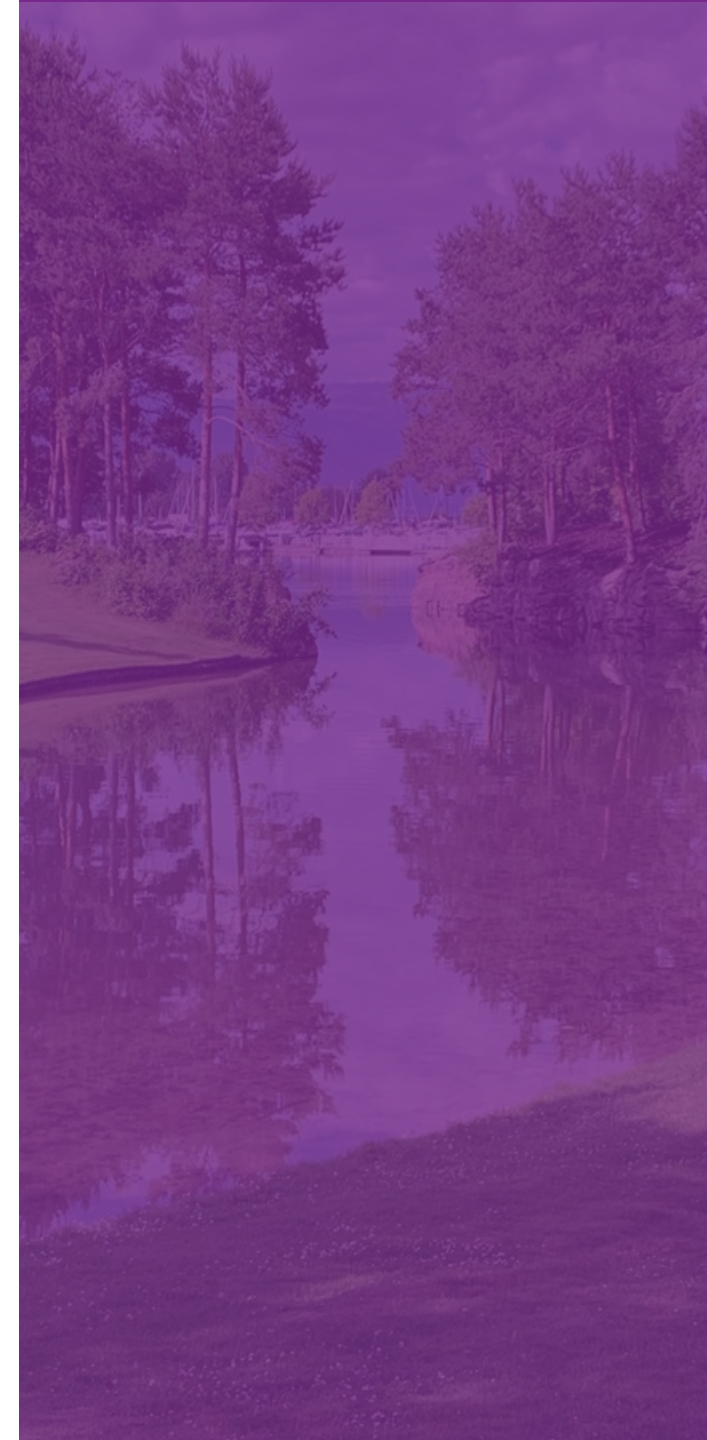
**If something happens and my wife needs to find that information, she would have no idea where to look. So I thought, there's got to be a better solution than paper documents.**

Rolf started looking into cloud-based solutions when he came across SideDrawer on LinkedIn. After signing up for a free account, he found a way to have all of his investment accounts, bank accounts, and insurance information... everything all in one place.

"I put my wife on as a collaborator," Rolf continued, "she explained how straightforward it was to use." That's what got the ball rolling and how Rolf initially thought he would use it – for his own family.

Looking further he discovered that he could use SideDrawer as a value add to benefit his clients and began implementing it shortly after.

Previously, clients were emailing him sensitive information as part of the planning process, posing a security and business risk. In the eight months since implementing SideDrawer, Issler Group has benefited from significantly greater data security and document organization.





## SideDrawer – The Solution

Rolf noted that while the capability to organize clients' sensitive information was a value add, SideDrawer equally provided a process for administrative efficiency for all the document exchange that occurs in his practice.

In every financial planning engagement, there is a tremendous amount of data collection to help paint the picture of the client's financial and estate situation.

**Rolf's partnership with SideDrawer became integral to preserving the security of his firm, while also providing a user-friendly alternative to traditional document management.**

"I don't want you sending your pay stub, driver's license, social insurance information or whatever you have through email," said Rolf, "That's a big risk factor to you and also for my company. What happens if that information gets into the wrong hands? I'm now potentially liable for any costs associated with that. I can't afford to have that liability, even though I do carry insurance to protect against that risk."

SideDrawer is particularly useful because it's accessible to his clients. "I can get a twenty-two-year-old client to install the SideDrawer app on their phone." he continued, "It's easy. If I need a driver's license, well just snap a pic, upload it and we're done."

"A lot of our habits inform how we think about money," said Rolf, "Historically, working with an advisor was time-consuming and complex. We had to gather all of our documents and take them to the advisor. If something was missing, it often meant finding the missing piece and going back and forth. Or it resulted in poorly designed financial strategies. All this made financial planning and money management too complicated for most people to think about."

"I want to empower my clients through the planning process and make financial planning accessible to a wider audience. If somebody is technology illiterate, for them to log into SideDrawer and just put in their name or their address and answer other questions - it doesn't take a rocket scientist to figure that out."

**SideDrawer facilitates a partnership approach to client service. We'll take the data and work together; we'll develop a strategy that makes sense for them. It's not me being the advisor and saying, 'Here's what I'll do for you.'"**





## Implementing SideDrawer

In terms of how Issler Group started using SideDrawer, Rolf noted that they focused more on document management as their core use case. "Here's a wonderful platform that I can provide to my clients free of charge." said Rolf, "They can upload all of their important documents, Wills, POAs etc. That was the initial rollout strategy.

"As I do their semi-annual reviews, the first thing I do is introduce them to SideDrawer. I positioned it as our new client hub. Right up at the top is a contact card, here's where you can book a meeting with me, send me an email, access my social media, and everything's there.

Before our meeting, I add all of their investment accounts, and insurance policies, put all of their documentation in there and set it up so that when I sit down with them, I can bring up their investment statements on SideDrawer. By the end of the meeting, they're comfortable with navigating and finding their way around the platform."

By the end of the year, Rolf will have onboarded all his clients to SideDrawer. In phase two, he will rollout SideDrawer to the business consulting clients so that they have the capability to improve their business efficiency too.

## Info Requests offered additional flexibility

“When I am onboarding a new client, I would always give them a shopping list of things that we needed. Most of the time I would only get a part of that list completed in an email with multiple attachments, and I would have to organize it all and save the documents to my storage system. It was slow and time-consuming work.”

“Now onboarding with SideDrawer, I show them how to access it, add them as a collaborator, and send an Info Request, they complete it and the documents are instantly filed in the right place without them emailing me and then me spending valuable time organizing and filing.”

“That’s admin time. That was costing me efficiency. Now recently, with the introduction of Simple File Requests, I could say ‘hey, I need your driver’s license. Just send it out there.’ And it’s done. This has simplified my process and my practice.”







## Practice-wide Efficiency

Rolf went on to give an example of SideDrawer's solution in his daily operations.

"Just this morning, I shared my corporate documents with my accountant," said Rolf, "I got an email from my accountant saying, 'Hey, I need this, this, this, and this to complete the corporate year-end. Since I had everything set up in my corporate SideDrawer. All I had to do was make her a collaborator on SideDrawer, and we were done."

When asked how his young clients enjoyed using SideDrawer, Rolf gushed about how user-friendly the platform was for younger and older clientele alike.

"They love it," he said, "They love the technology. The simplicity and ease of use, they're just used to it. But here's the surprising thing to me -- It is clients that are in their 50s in their 60s that like it, too. It's not just the younger demographic, Gen Z and millennials, that are using this technology. It's GenX and Boomers, too."

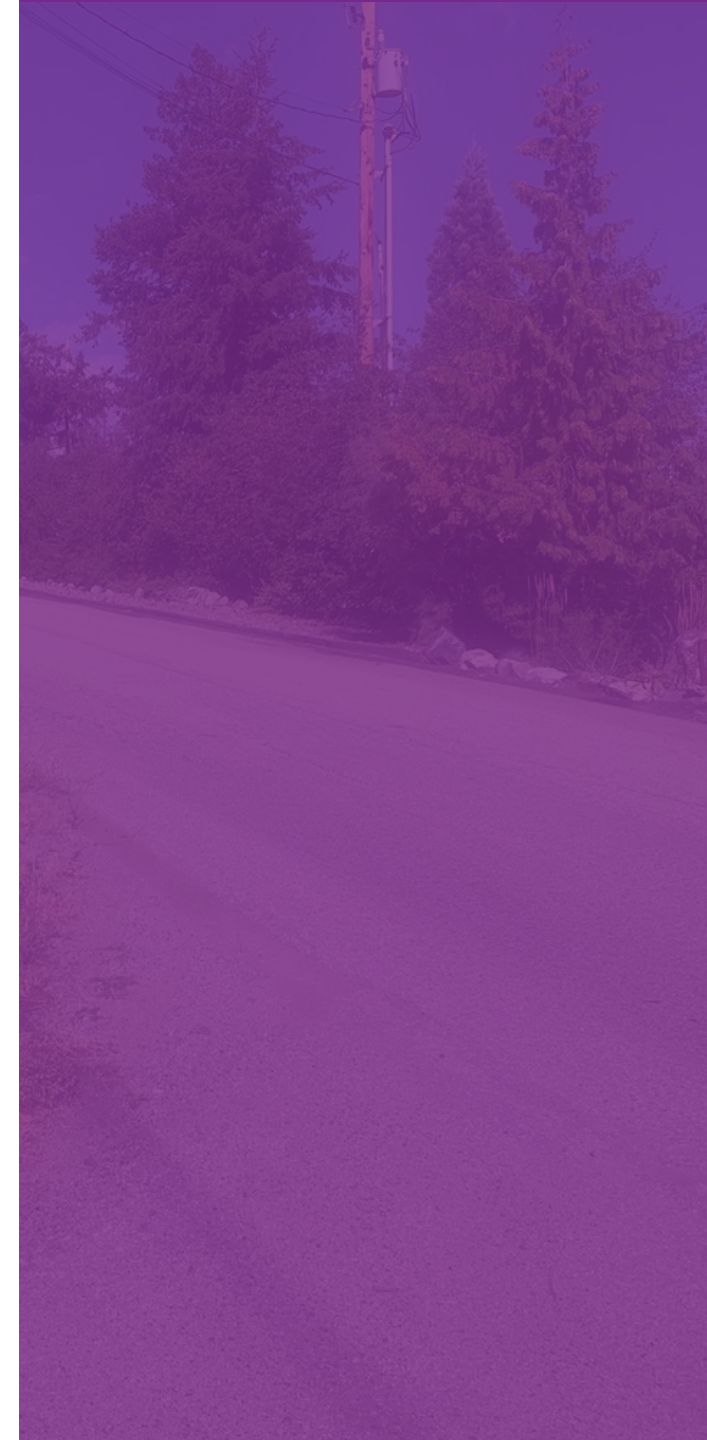
This is a particularly good thing, as many financial management clients can be wary of the learning curve of new software. But SideDrawer isn't just user-friendly-- it's extremely secure as well.

"I want to be proactive so that I can reduce the risk of there being a problem or maybe even eliminate the risk of being a problem," said Rolf, "I would feel terrible if my client's information fell into the wrong hands. But more than that it would be a business risk if somebody's identity is stolen because of a data breach on my end. It would damage that relationship - likely irreparably."

## Support Levels

Rolf also explained that he appreciated SideDrawer's support team, which is dedicated to providing quick and efficient technical support. "If there's a little glitch, which is understandable, they get resolved very quickly."

We're looking forward to continuing our partnership with Issler Group and seeing how Rolf's clients continue to enjoy the platform.





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## What is SideDrawer?

SideDrawer is a cloud platform that provides financial advisors and individuals services to ensure online document sharing security. It is designed as a physical filing cabinet but with amplified safety. As a result, it benefits organizations and their clients by reducing expenses, time, and resources.

SideDrawer is the perfect solution for organizations dealing with confidential information through email. Financial advisors can send and receive sensitive documents without the risk of forwarding them to the wrong person. Additionally, SideDrawer is protected with several firewalls to secure clients' data completely. Therefore, it is an excellent alternative for financial advisors and their clientele.

Excited to know what SideDrawer can do for your business?

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