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Local couple looks to overhaul personal finance planning

Adjustable timeline, clearinghouse software has caught eye of big names

Published May 16, 2012 by Geert De Lombaerde



On the heels of a successful presentation at a West Coast conference, a local investment manager is on the prowl for growth capital to formally launch a financial planning tool that helps individuals prioritize large money decisions.

Tom White, managing partner of Cool Springs-based CAP Partners, and his wife Karen have been chewing on and refining the personal finance concepts behind iQuantifi since 2006, investing about \$270,000 along the way. They began earnestly

building a prototype last summer, using proven financial planning concepts to underpin a system that lets users — once they've entered or imported their financial information — evaluate and adjust their **financial goals on an interactive timeline**. (Check out [a screengrab here](#).)

The kicker — and the reason the Whites proved to be popular at the recent Finovate confab in San Francisco — is that iQuantifi will then build an action list tied to specific goals and give financial services providers the opportunity — for a fee, naturally — to market instantly to those users. Hello, vetted and eager prospect.

"The value to the institutions is that the customer has done the homework," Tom White said. "Clicking on an offer will take them straight to the page they need, not some landing page. We're taking away the friction in the process."

Karen White told *NashvillePost.com* that Finovate attendees, including blue-chip names such as Wells Fargo, liked what they saw in San Francisco and pressed the Whites with questions about selling or private-labeling iQuantifi's software. The Whites aren't going down that route, though: They have launched a fundraising hunt for \$1.25 million, money they say will let them complete their clearinghouse platform, build out their team and flesh out a marketing plan. If they land the money, they see iQuantifi growing to about a dozen people in the near future.

Tom White said he and his wife will market the iQuantifi platform, which incorporates technology that has 11 patents pending, to all kinds of financial institutions so that consumers can have the choice of a local, regional or national bank for a car loan, mortgage or other product. He said he plans to register iQuantifi as a registered investment advisor, even though it technically doesn't need to. Doing so, he said, will help project the idea that iQuantifi is built on solid financial planning principles.

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