

# Riverwater Partners



**\$800 million**

Assets Under Management

**2016**

Year Founded

**11**

Employees

## Overview

### About Riverwater Partners

Riverwater Partners is a Milwaukee-based investment advisory firm dedicated to responsible investing. Their experienced investment and client services team of independent fiduciary advisors delivers a range of services from wealth management for individuals, equity strategies for institutions and individuals and investment advising for non-profits, foundations and 401(k) plan sponsors. Working for positive change and achieving competitive returns do not have to be mutually exclusive.

They are proud to be a Certified B-Corp™ and a Certified Woman-Owned Business.

### Riverwater Partners + Dakota

Riverwater Partners became a Dakota Marketplace member in March of 2022 with the goal of expanding their network and finding a reliable source of new and updated data.

## Why was Marketplace the solution?

We see Dakota as more than a data provider. Dakota provides valuable context around the accounts through their weekly call series, Dakota events across the country, a professional network, and has helped to develop an institutional sales approach. The practices Dakota shares have increased our credibility and exposure.

## What were you looking for in a data provider?

Riverwater Partners was looking for a source that provided reliable data and exceptional service.

## What problems did Marketplace help you overcome?

As an emerging manager we wanted a reliable source of information to increase sales prospecting efficiency and have a built-in tool to help maintain a disciplined sales process.

## What benefits and/or growth have you seen because of Dakota Marketplace?

As a result of Dakota's interaction with our firm, we have instituted quarterly webinars to interact with our prospect base and generate content for our firm. We have built a sales reporting structure around the Dakota model, and now provide a quarterly update internally to the team about our institutional development efforts.

On the sales development front, we have become one of the most recognized emerging manager brands in eVestment and are actively growing consulting relationships. The single biggest opportunity we have is a result of their event series that has put us into the final decision position with one of the largest wirehouses for their platform.