


# How We Optimized Our Tech Stack at Mezrah Consulting

By: Todd Mezrah

A horizontal band showing the silhouettes of several people in a modern office setting, looking out a large window. The scene is backlit by bright light, creating a high-contrast silhouette effect.

At FINSECA's Advanced Markets conference on June 20th, 2025, Mezrah Consulting's CEO and Founder, Todd Mezrah, had the opportunity to speak in a session titled *"Tech That Talks Back: Building a Smarter Stack for the Modern Practice."* Todd shared how we think about technology at Mezrah Consulting ("Mezrah")—and how we've optimized emerging technologies to intentionally drive scale, efficiency, and better outcomes for our clients in the executive benefits space. Below are key takeaways from the discussion.

## Why Technology Is at the Core of Our Strategy

One of the biggest challenges advisors face today is achieving scale without sacrificing quality or compliance. Firm leadership should continually ask itself: How do we scale our business? How do we create more deliverables faster, meet with more people, and still grow the right way?

For us, scale has never been about just adding more people. It's about optimizing its processes and investing in technology that helps us do more with less. Today, our corporate technology portfolio includes **36 different tools**, **six** of which we built in-house to solve problems we couldn't solve any other way.

Some of the highlights include:

- **ChatDCP** - Mezrah's internal training and support platform, is now evolving into a client-facing tool for deferred compensation plan education.
- **mapbenefits** - Mezrah's proprietary plan administration platform built on Salesforce—designed for speed, customization, and scale.
- **P&L Impact Reconciliation (P&LIR)** - A tool Mezrah created to manage plan-related balance sheet risk daily and reduce P&L slippage.

At the end of the day, we really sell our technology portfolio. It's not just about services or strategies anymore—our technology differentiates us and resonates with clients.

## Why We Build, Not Buy

We've wrestled with a lot of build vs. buy decisions. Often the tools we needed just didn't exist. So, we built them. That willingness to create custom solutions has helped us close the gap between client needs and what the market has to offer.

**Firms often face 'implementation overwhelm' with plug-and-play solutions. It may be tempting to try to fix a problem by layering software. But that usually leads to more friction, not less. The focus should be on solving problems with technology, not headcount. But to do that, you must understand your client's journey and the problem you're solving.**

**Identifying friction points first is critical before making any investment. If you skip that step, even the best tools won't move the needle.**

## What We Learned from Building Our Own Technology

Mezrah has learned a lot through trial, error, and persistence. When Todd closed his first Fortune 500 client, he uncovered the multitude of dynamics that come into play when administering benefit plans that are "living and breathing" on the company's balance sheet. He set out to find a solution that would help smooth out the laborious administration process but came up with nothing that suited his needs. No platform had the scale he needed, so he built his own. After five years of development, mapbenefits entered the marketplace as the first cloud-based plan administration platform for executive benefit plans.

**Building technology that solves a real problem is going to take time, energy, and a fair amount of capital including intellectual. It's not easy. But when it's built right, you're solving the problem in the right way with your own DNA.**

## How We Evaluate Technology Return On Investment (ROI)

When someone at the firm brings forward a new tool for consideration, Todd, and the leadership team immediately zero in on the fundamentals:

- *What problem are we trying to solve?*
- *What's the value for us—and for the client?*
- *What's the ROI, and how do we integrate the tool into our workflow?*

**We don't move forward if we can't clearly answer those questions. We've learned the hard way that unless a tool solves a real, defined problem and becomes part of the day-to-day rhythm of the business, it's likely to sit on the shelf. ROI doesn't come from buying more software- it comes from aligning tools with real friction points and embedding them into how we operate.**

## Leading With Curiosity

A cornerstone of Todd Mezrah's philosophy of business has been his approach to technology as a growth mechanism—building a strong technology-backed strategy isn't just about building tools—it's about mindset. Todd carves out time every day to stay curious. He reads *Wired*, *TechCrunch*, numerous technology blogs, and listens to relevant podcasts like *Acquired*. He is also in touch with clients consistently, finding purpose in growing his relationships as well as keeping an active dialogue with Mezrah's partners to drive opportunity in the ever-changing economic environment.

But most importantly, he stays grounded on the main purpose—investing in tools that empower our team and clients to move faster, think bigger, and deliver more rather than hiring more bodies just to keep up. Empowering our people through smarter technology is how we scale.

## Why It All Matters

The focus of the FINSECA discussion wasn't to showcase shiny tools — it was to offer a practical framework for how advisors can use technology to drive real results. Technology isn't about chasing trends or automating for the sake of it. It's about reducing friction, empowering advisors to do their best work, and delivering value to their clients more efficiently and effectively. When deployed strategically, technology doesn't just support the business- it becomes a growth engine. A differentiator. In a market as competitive and unique as Executive Benefits Consulting, that makes all the difference.

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## More Information

For more information, email Mezrah Consulting at [connect@mezrahconsulting.com](mailto:connect@mezrahconsulting.com) or call (813) 367-1111. Visit our website at [mezrahconsulting.com](http://mezrahconsulting.com) to learn more.

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### Who We Are

Mezrah Consulting, is a national benefits consulting firm based in Tampa, Florida, with **more than 30 years of expertise** in executive benefits consulting for over 300 companies throughout the U.S. As **subject matter experts**, we specialize in designing, funding and administering **non-qualified executive benefit plans** while uncovering value and mitigating. Our proprietary cloud-based fintech platform, **mapbenefits®**, provides **enterprise plan management** for plan participants and plan sponsors. Our focus is on sharing ideas that enable companies and key personnel to accumulate and preserve wealth on a tax-favored basis through innovative solutions and **protect their business strategies and financial performance**.



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