

# Success with Quantifiable ROI

The following success stories were realized by actual advisors who took part in a pilot program involving eMoney 360Pro™. These successes include quantifiable financial results as well as opportunities that are expected to lead additional revenues.

## New Client

Situation	Impact To Organization	Features that Attracted The Client
<p>Husband and wife in their mid-60's were presented with the eMoney application. The client had a large position within a TIAA CREF account.</p>	<ul style="list-style-type: none"> <li>• \$600,000 of new assets under management (AUM)</li> <li>• \$500,000 life insurance sale with \$10,000 premium</li> </ul>	<ul style="list-style-type: none"> <li>• Client vault</li> <li>• Comprehensive asset allocation</li> <li>• Nightly updates to their balances</li> </ul>

## Retirement

Situation	Impact To Organization	Features that Attracted the Client
<p>Retired executive whom the advisor was already providing planning services to. This client had approximately \$1.5M of managed money and a large position of his company's stock.</p>	<ul style="list-style-type: none"> <li>• Annual planning fee increased by \$750/year</li> <li>• Client's daughter is now a new client</li> <li>• Advisor feels he is in better position to retain AUM into the next generation</li> </ul>	<ul style="list-style-type: none"> <li>• Alerts and alarms</li> <li>• Client vault</li> <li>• Account aggregation</li> </ul>
<p>When presented with the eMoney system, the client was immediately intrigued. The advisor was able to increase the annual planning fee without client objection. Additionally, the client was so impressed with the system he referred the advisor to his daughter.</p>		

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## Young Couple

Situation	Impact To Organization	Features That Attracted the Client
<p>Couple in their early 40's with a total income of \$100,000. Clients had recently relocated and their relationship with their previous advisor was non fee-based. The spouse recently received an inheritance and had the money with the mother's broker who they were quite happy with.</p>	<ul style="list-style-type: none"><li>• \$1,500/year planning fee</li><li>• \$700,000 of new AUM as the inheritance moved over to associated RIA</li><li>• \$135,000 in a 1035 exchange annuity rollover</li></ul>	<ul style="list-style-type: none"><li>• Account aggregation</li><li>• Client vault</li><li>• Communication with advisor through client site from remote location</li></ul>
<p>This client was presented with the eMoney system in association with a fee-based plan and the management of their investment assets. The client chose this plan over the mother's broker.</p>		

## Organization

Situation	Impact To Organization	Features That Attracted the Client
<p>The advisor was one of several investment advisors to this organization. The organization was having a hard time doing any kind of comprehensive asset allocation modeling on their holdings and had been struggling to deliver investment reports on a quarterly basis. According to their accountant, "they needed to do a better job putting their hands around everything." The advisor presented the eMoney system and had an immediate positive response from the organization.</p>	<ul style="list-style-type: none"><li>• \$2,000/year fee</li><li>• Advisor has emerged as the "go to guy" for the organization</li></ul>	<ul style="list-style-type: none"><li>• Client vault</li><li>• Comprehensive asset allocation</li><li>• Updated investment values through account aggregation</li></ul>

## Business Owner

Situation	Impact To Organization	Features that Attracted the Client
<p>Medical Supply business owner with 40 employees.</p> <p>The advisor handed the business owner the eMoney marketing video after having been unsuccessful trying to get his business in the past.</p> <p>The client and his wife were impressed enough to go to the advisor's office for a meeting. The advisor used his personal case to demo the system.</p>	<ul style="list-style-type: none"> <li>• \$7,500/year planning fee</li> <li>• Two referrals from client, one of which is another business owner</li> <li>• Three policies on employees of the firm, with premiums of \$10,000 each</li> <li>• Potential of three employees becoming planning clients</li> <li>• Potential \$100,000 fee associated with sale of a division of client's company</li> </ul>	<ul style="list-style-type: none"> <li>• Client vault</li> <li>• Updated values through aggregation</li> <li>• Client site</li> </ul>

Below are the results of five clients' increased business with the advisor's use of eMoney 360Pro.

### Year One Revenue Increases by Case Summary

	Planning Fees	Fees From AUM	Target Premium**	Total Company Premium	Total Advisor Revenue
<b>New Client</b>		\$3,000	\$10,000	\$13,000	\$8,000
<b>Retirement</b>	\$750			\$750	\$750
<b>Young Couple</b>	\$1,500	\$3,500	\$20,000	\$25,000	\$15,000
<b>Organization</b>	\$2,000			\$2,000	\$2,000
<b>Business Owner</b>	\$7,500		\$30,000	\$37,500	\$22,500

\* Assumes ½ of 1% per year on new assets under management

\*\* Assumes 50% First Year Commission

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