

eMoney Data Entry

eMoney's Data Entry provides expert setup and maintenance of your clients on the eMoney system. Our highly skilled specialists enter your client data in a secure, paperless work environment so you can focus on what you do best – connecting with clients and building your business.

SAVE TIME.
SAVE MONEY.
INCREASE EFFICIENCY.

Data Entry Services Can Help You With:

- Client case entry (average client case entry costs only \$100)
- Scanning and uploading documents securely into the Vault (wills, deeds, insurance policies, and more)
- Generating periodic statements for all of your clients (quarterly, semi-annually or annually)
- Setting up your clients' Personal Websites

Benefits to You:

- Optimize the client entry process
- Manage your book of business more efficiently
- Scale your practice cost effectively
- Increase client retention
- Speed adoption of clients on the system
- Secure data transmission

Here's How the Process Works:

- 1** The advisor securely transfers the completed fact finder and any other client documents via RightFax (secure fax) technology to Data Entry Services.
- 2** Data Entry Services confirms receipt of the client information and enters the data and, when requested, uploads documents into the client's Vault.
- 3** Data Entry Services provides the advisor with a list of detailed information regarding the case. If needed, a call is scheduled to review the data.

Advisor Success Stories with eMoney Data Entry

Situation

An advisor with over 120 clients wanted to add 10 – 15 clients a month to the eMoney system during his first year using eMoney. The advisor planned on hiring a dedicated staff member to learn the system and handle all the data entry. The advisor anticipated paying the new hire a salary of \$32,940.

The advisor learned about Data Entry Services and estimated the cost of adding all his clients to be no more than \$18,000.

Data Entry Services worked closely with the advisor to get all his clients added to the system two months ahead of schedule.

Impact to Advisor

- First year savings of \$14,940
- Annual savings of \$32,940
- Advisor able to assess a \$500 annual client fee, resulting in \$60,000 of new recurring revenue
- Advisor feels he is better positioned to identify new opportunities and attract and retain clients

Situation

A busy office runs quarter-end balance sheets for all of their clients. With just under 200 clients, the advisor's assistant was struggling to generate the reports while still managing her other responsibilities. The process took the assistant one week each quarter to complete.

To save time and alleviate the stress placed on his assistant, the advisor decided to use Data Entry Services to generate the quarterly reports. Data Entry Services generated and uploaded to the Vault a quarter-end report for each client. They completed the task within 3 ½ hours at a cost of \$175.

Impact to Advisor

- Cost savings over \$400 (assistant's time equal to \$576 – Data Entry Services fee of \$175)
- Freed up valuable resource
- Reports securely sent via each client's Vault
- Minimal cost

Find out how **eMoney Data Entry Services** can help you too!

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