

GREENWALD WEALTH MANAGEMENT

Solving for Specific Planning Needs with Success Coaching



GREENWALD

WEALTH MANAGEMENT

Greenwald Wealth Management (GWM) takes a holistic, fully customized approach to financial services, offering comprehensive planning to the medical community. The firm has two financial advisors, President and Owner, Joel Greenwald, MD, CFP®, a former practicing physician, and Mai Yang, CFP®. Together, their experience and expertise bring great value to their clientele, sixty percent of whom are physicians.



**Hybrid affiliated with
Commonwealth Financial Network**



Serving over 110 households



Located in Minnesota



Office of five employees



eMoney user since 2020

"Throughout the training process, our coach learned about who we are so that she can best support us. We were able to talk through a lot of the things we wanted to achieve. If we were stuck, she would prompt specific tasks that got me to dig through and learn more about eMoney to make the most out of the meeting."



**-Mai Yang, CFP®,
Financial Advisor**

See How eMoney Can Work for You

Learn more at www.emoneyadvisor.com
or call us at 888-362-4612.

A Different Fintech Experience

Holistic, comprehensive planning has been a cornerstone of GWM's approach. To serve both established and young physicians—each with a distinct set of planning needs—they required a robust financial planning platform to fill the gap of their previous software. With eMoney, they immediately saw that the support and learning resources to adopt the technology were unique to the training options available from fintech providers.

A Led Session, Not a DIY

To incorporate the technology into their practice, Yang committed to eMoney success coaching designed for new users. Yang recalls their coach took a consultative approach to "get to know us, and who we are, and what we're trying to accomplish for our clients." The sessions were not a do-it-yourself experience, nor were they simply about following along with a live tutorial—the experience was led by an eMoney expert ("coach") and customized for the firm.

Learning Journey for a Team

GWM opted to participate in coaching as a team, which reaped multiple benefits. Learning of any kind can easily be put off by other priorities, but the team structure gave each attending member accountability and a shared purpose. GWM's sessions often became a collaborative brainstorm as each participant would generate questions off a specific workflow or feature. Having a dedicated partner to lead the custom session allowed the team flexibility to redirect their focus to what was most important to them.

Access to a Depth of Expertise to Achieve Efficiency

An area GWM wanted to address in their sessions was how to streamline some of their existing processes and best utilize the planning features of the tool. Their coach was able to show the diversity and granularity of reports for one of the firm's favored features: tax planning. By talking through their current approach with their coach, they realized that many of their internal reports could be replaced with pre-built reports within the eMoney platform.

"I felt it [success coaching] was definitely beneficial to do as a team. Someone may have a question that the other person may not have thought of. This was really a brainstorming session on how we can best utilize eMoney and I think the best way to do that is as a team."

-Mai Yang, CFP®, Financial Advisor