

Wymer Brownlee Wealth Strategies: Helping Clients Think Bigger and Live with Purpose



Company

Founded in Fairview, Oklahoma as Wymer Tax & Accounting, Wymer Brownlee Wealth Strategies has grown over the past 50 years to seven locations and 60 staff members, as well as broadened its offering to include financial planning, wealth management, business consulting, and expanded tax and accounting services. As registered representatives with Avantax Investment ServicesSM, Wymer Brownlee advisors are equipped to deliver a tax-smart approach to holistic financial services.

Kyle Brownlee is the CEO and Senior Wealth Advisor* for Wymer Brownlee. He joined the firm in October 1999.



Established in 1969



Headquartered in Enid, Okla., with seven locations across the state



\$600 million in AUM**



eMoney user since 2016



Kyle Brownlee
CEO and Senior Wealth Advisor

A Holistic Approach to Wealth Management

Although Wymer Brownlee was established as a local firm offering tax and accounting services, Brownlee says it has always offered clients more than simply mathematical expertise and number-crunching. “From the start of our practice, it’s been much more consultative and holistic,” he says.

But over the years, Brownlee felt there was a growing opportunity to widen the role the firm was playing—and could play—in clients’ lives. He challenged his team to move beyond offering traditional financial services and find other ways to serve clients.

“I have this conviction that if all we do is accurate tax returns and have properly diversified portfolios then we’re missing the mark,” says Brownlee.

A formal relaunch of the Wymer Brownlee brand showed its commitment to purposeful living and helped differentiate the firm.

“Our integrated services of wealth management, tax, accounting, and business consulting allow us to assess the big picture of a client’s financial life, all in-house,” says Christine Golden, the marketing director for Wymer Brownlee. “But we aren’t doing our job fully if we only help grow financial assets. We want to help clients do something meaningful with their money—that’s where the ‘purposeful living’ part of our tagline comes in.”



Christine Golden
Marketing Director

Impacting Change with the Family Leadership Summit

In addition to simply raising the company profile, the team wanted to differentiate the brand from other financial services firms in the state and connect with new clients in the community. They also wanted to show prospective clients how committed Wymer Brownlee is to the idea of the ‘full financial picture.’

“Finances are really just a tool to help you live the life that you want,” says Golden. “And that should be a life that’s meaningful, filled with purpose, supports your passions, and helps you care for the people that you love.”

The firm helps couples get on the same page about budgeting, spending, goals, and more. And for Brownlee, estate planning is an especially important component. Early in his career, Brownlee worked with a couple who later passed away unexpectedly, leaving behind two young sons. It provided an important lesson.

“That was the first time in my career where we had really done everything, including wills, trusts, and guardianship for the children,” he says. “I never expected those parents to pass and leave two minors, but it reaffirmed my commitment to make sure our clients have everything completed correctly. If families don’t have their estate planning done correctly, it’s a huge gap in their planning.”

Brownlee firmly believes this gap could have an enormous impact on families. “So, we’ve changed ‘estate planning’ in our firm to ‘family leadership’ because I really believe that’s what it is.”

That’s where the idea for the firm’s Family Leadership Summit was born. Positioning itself as a community partner, Wymer Brownlee held an

inaugural event for Oklahoma City-area parents in fall 2019. Since the firm is committed to seeing the ‘big picture,’ the day didn’t solely focus on money management tips—there were also seminars on parenting and communication.

“Our advisors say one of their greatest challenges is helping create financial compatibility within couples,” said Golden. “We knew that marriage needed to be a component of the event. It’s hard to sit down and have a discussion about a topic as stressful as money if there’s not a foundation of good communication and shared priorities. When couples communicate effectively, it makes our job easier.”

The event was a success: It generated new leads for the firm and showed existing financial services and tax clients the breadth of Wymer Brownlee’s services.

“So much of what we do is about behavioral coaching, not really even about money management,” Golden says. “We just believe it’s different than what’s out there, and people deserve to have the full financial picture incorporated into their advice so it can be truly strategic.”

“What people really need is someone to come alongside them, to be on their team, to support and encourage them, and to hold them accountable so that they can meet their long-term goals. And that’s where we feel like we can impact change.” – Kyle Brownlee

How eMoney Supports Wymer Brownlee's Mission

As the firm works to attract new clients and manage new assets, Brownlee knows the importance of using financial planning tools to complement the client experience. To keep clients engaged, his firm uses eMoney, a full-spectrum planning solution that can seamlessly transition from goals-based to cash flow planning.

“We use eMoney exclusively now from a planning standpoint because we find it’s really robust and very customizable,” says Brownlee.

For clients new to the firm, like attendees from the Family Leadership Summit, advisors rely on the eMoney Client Portal to drive their participation in the financial planning process.

From any device, clients can view their budgeting, spending, and progress toward goals, including paying off debt, funding a child’s education, and saving for retirement. According to Brownlee, seeing things in one place helps clients stay accountable. And to keep them organized, he encourages clients to use the Vault to securely store important documents like wills, trusts, and deeds. Clients can access these files at any time.

Within the portal, clients can connect their various financial accounts, providing both the client and the advisor with a complete view of their financial picture. Not only does this aggregated data help Brownlee and his team offer holistic, strategic advice, but it also shows them assets held away and opportunities for future business.

And because estate planning is so important to Brownlee’s practice, the firm’s advisors use Advanced Planning to collaborate with clients in a variety of ways, including charitable planning, tax calculations, and trust modeling. Mid-meeting, the team can use eMoney to visualize the impact of a client’s decisions and the benefits of their recommendations.

“eMoney gives us a higher level of confidence in the advice that we’re giving,” he says. “I find great value in the quality and accuracy of the software, and the ability to create alternate scenarios.”

This collaboration helps Brownlee and his team connect with clients on a deeper level. And in turn, clients feel more prepared and confident in their future.

“We get a lot of feedback, maybe six months into the relationship, and it’s almost always ‘Nobody has asked me this. Nobody’s ever recommended this. I wish I had come here 10 years ago,’” says Brownlee. “It’s a very humbling compliment.”

What's Next for Wymer Brownlee

As a firm that's been helping families with their finances for 50 years, the folks at Wymer Brownlee Wealth Strategies have seen many changes in the financial planning industry.

As technology advances and new generations focus on different financial goals, Wymer Brownlee strives to continue to provide a service that clients find valuable—and move beyond asset management. The firm has already seen success following their rebrand and formal commitment to holistic advice.

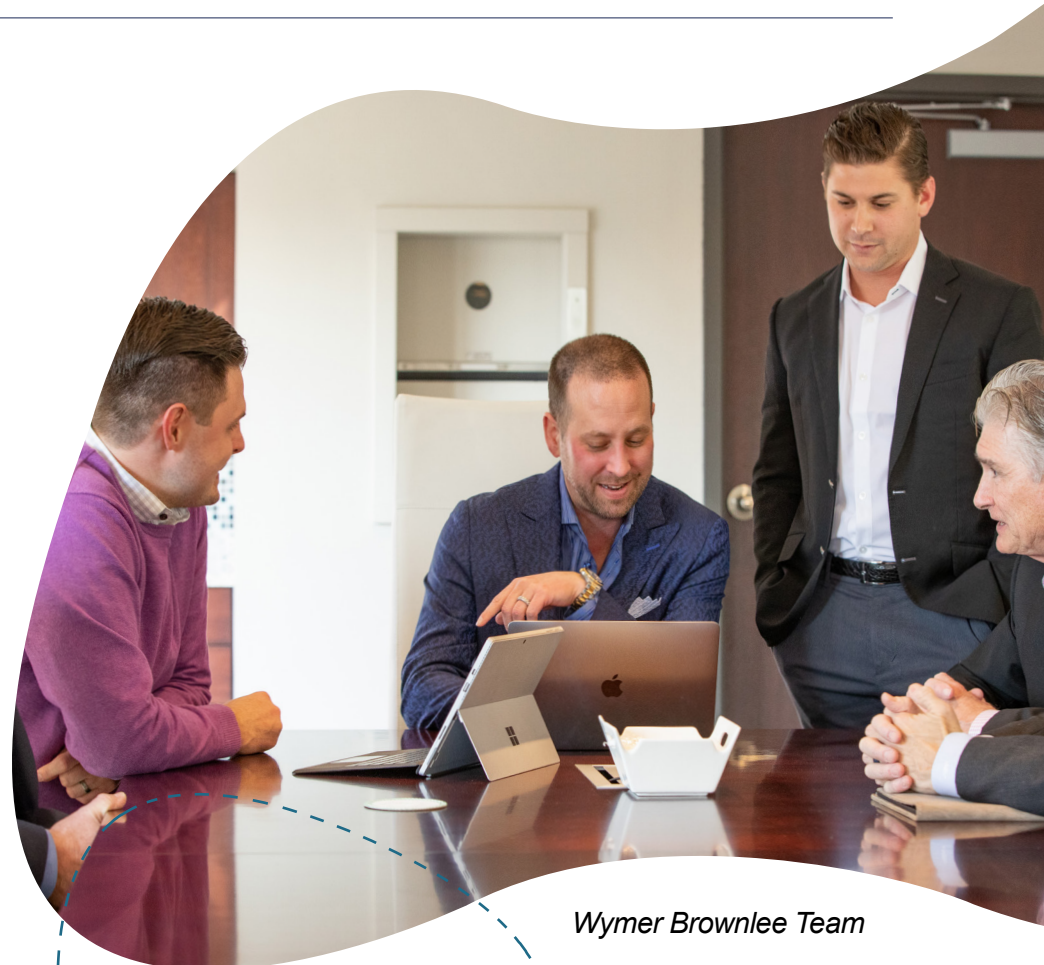
“There's been a real business pay-off for us in terms of the type of client we're attracting and the experience that they have with us. Clients have seen how different the financial planning process can be, and in return, that leads to them trusting us with more assets,” says Golden. “Since the rebrand, we've had several record-breaking quarters of generating new assets.”

And for Brownlee, he's finding personal fulfillment in his work, too.

“If all I do is invest money, I'm not sure I'm adding any long-term value,” he says. “I'm always looking for the greater purpose in a client relationship. It goes beyond money—I have a responsibility to protect families and help them achieve their goals.”

*Kyle Brownlee is a registered representative. Securities offered through Avantax Investment ServicesSM Member FINRA, SIPC, Investment advisory services offered through Avantax Advisory ServicesSM Insurance services offered through Avantax Investment AgencySM CA Insurance License #OK84394. Wymer Brownlee Wealth Strategies is not a registered broker/dealer or registered investment advisory firm.

**“Assets under management” is comprised of advisor, brokerage, direct-to-fund, and annuity assets held by Wymer Brownlee clients through Avantax as of Dec. 10, 2019.



Wymer Brownlee Team

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