

eMoney | CASE STUDY

Waverly Advisors: Achieving Engagement and Retention Goals Through Collaborative Planning

THE CUSTOMER



THE GOAL



THE SOLUTION



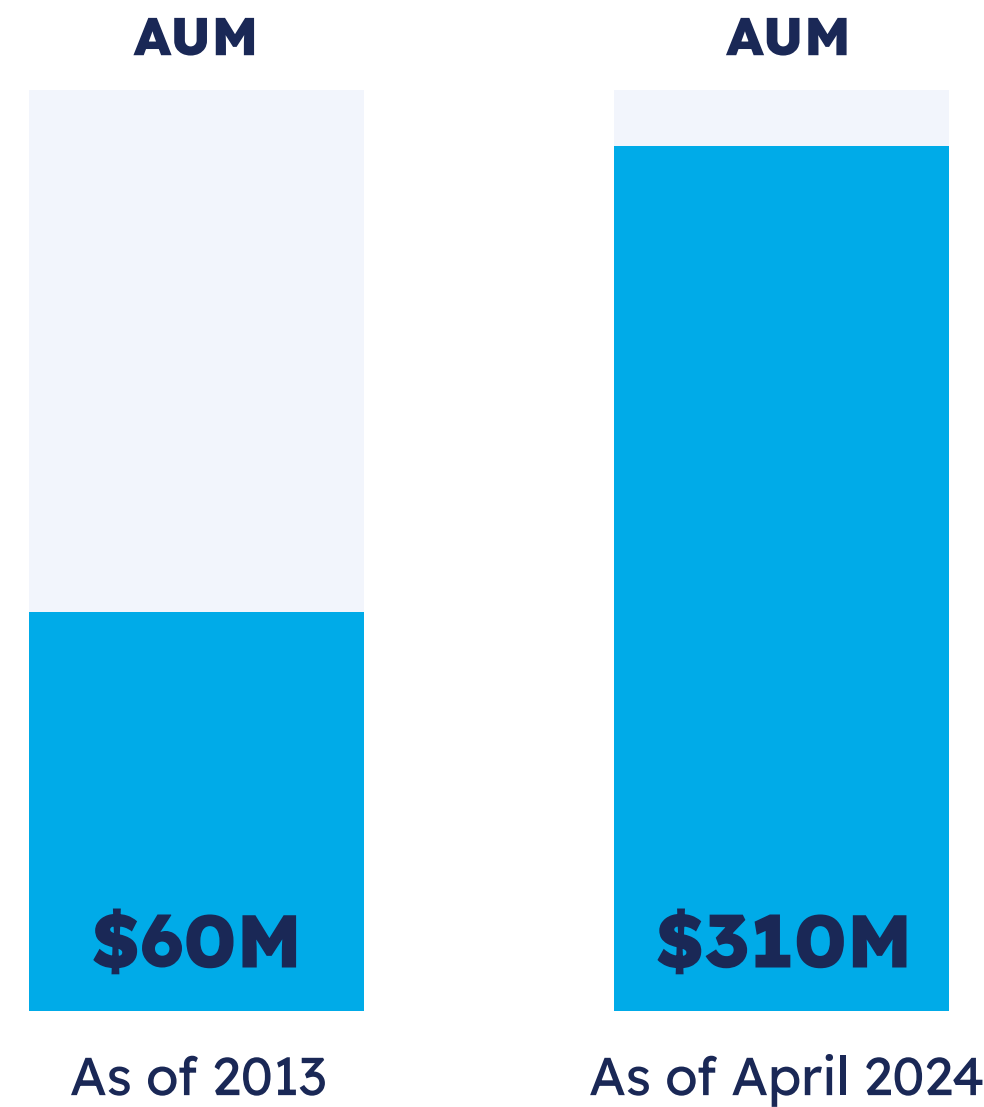
THE RESULTS



WAVERLY ADVISORS

Waverly Advisors,
Austin Office:

Maximizing Client Collaboration



95%
client retention
when joining Waverly Advisors
in June 2023

180
Client households served

Parent company AUM:
\$10 Billion
as of March 2024



Favorite eMoney features: Decision Center,
Plan Summary Report, Cash Flow reports

Company Profile



Established

1999, eMoney user since 2012



eMoney Product Used

eMoney Pro



Business Model

RIA



Location

Austin, Texas



Team Size

Six

The Goal

Waverly Austin is committed to fostering collaboration, engagement, and planning holistically to build stronger client relationships. They aim to provide an exceptional level of service that not only solves clients' problems but retains clients for life.

eMoney advances the goals of Waverly Austin by providing an intuitive and engaging planning solution, with a range of options for data visualization that enable effective and actionable communication.

“We want our clients to be more collaborative with us and feel like they have a say,” says Harrison DeShazo, Associate Wealth Advisor at Waverly Austin. “eMoney makes it easy for clients to be involved in the planning process from day one. When we give them a clear picture of what we’re trying to build in the platform, it really increases their desire to work alongside us.”

“Our goal is to meet clients where they are, in the way that works for them, to best guide them towards their goals,”

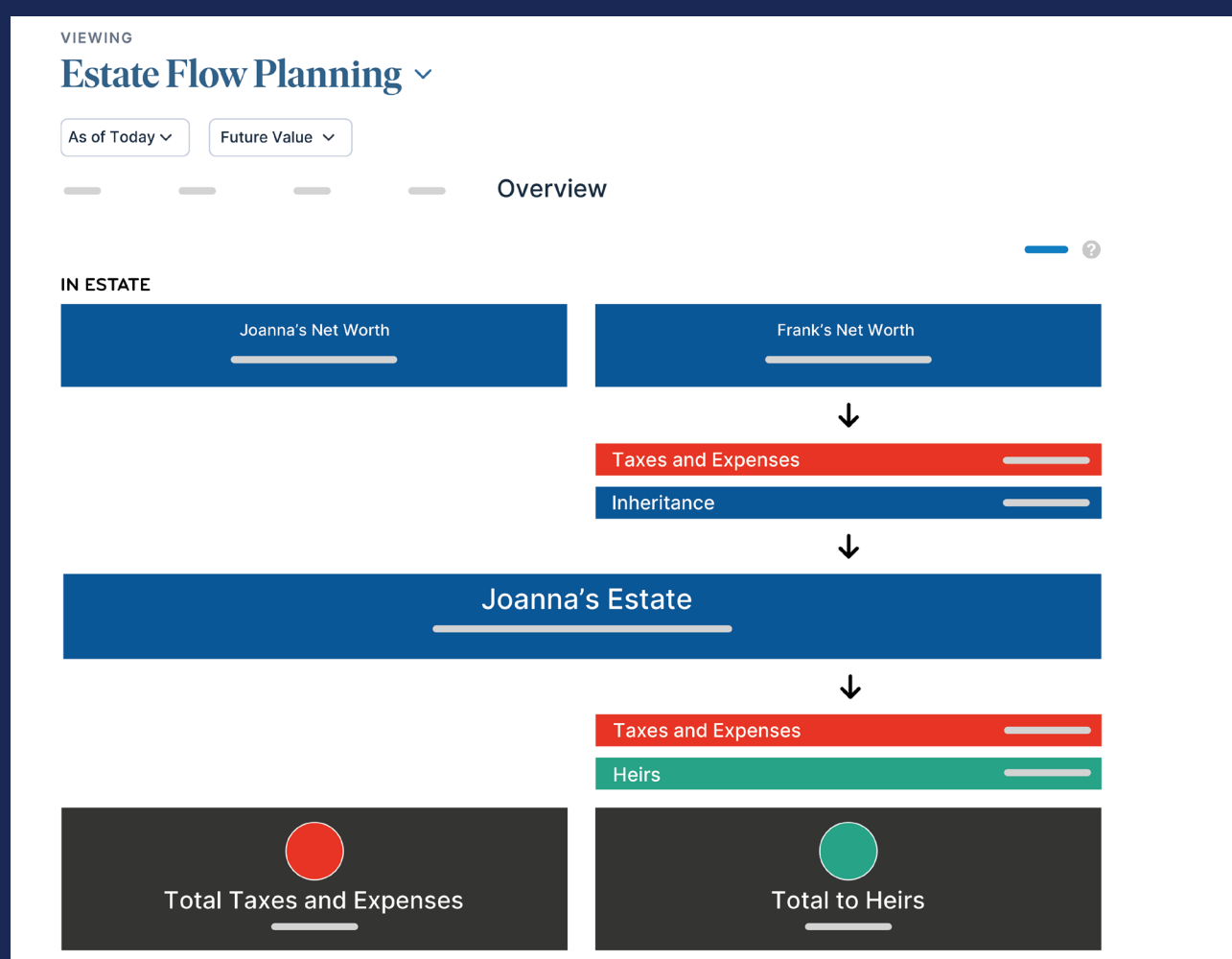
— James Werner, CFP®

Partner and Wealth Advisor





The Plan Summary and 5-year Cash Flow reports spur client questions.



Estate planning flowcharts visualize and quantify clients' estate plans

The Solution

eMoney allows Waverly Austin advisors to collaborate on a broad range of financial topics while monitoring client progress toward goals. Clients can securely share data via the eMoney Vault, while account aggregation features keep key planning information continuously up to date. This information flows seamlessly into Decision Center, where advisors illustrate the impact of important financial decisions. The combination of these tools enables a holistic view of each client's financial picture.

The Plan Summary report and 5-year Cash Flow reports are a consistent spotlight of regular client meetings.

“We’ve found these reports get clients to ask the most questions,” Werner says—a key to collaborative planning. “A client’s active involvement in their plan starts with a question. eMoney helps us create an environment that generates those questions.”

The flexibility of eMoney allows Waverly Austin to work with clients at different stages of their financial lives, especially as specific planning needs arise. Whether they are saving for future goals or focusing on their financial legacy, advisors can have the conversations that matter most to clients.

“Many of our long-term clients are more interested in the legacy they’ll leave. This is where we can really add value,” says DeShazo. “We can help them visualize in a simple chart where all of their assets are going, which carries a lot of meaning for clients. It helps them fully realize the peace of mind of having everything in place.”



Growth in client retention since becoming an eMoney client

The Results

By closely collaborating with clients, addressing financial needs as they arise, and building each client a holistic financial picture, Waverly Austin is engaging and retaining clients at a high level.

“eMoney has helped me maintain close virtual relationships,” says Glenda Molina, CFP®, Wealth Advisor at Waverly Austin. “We have all the data we need to create holistic, dynamic plans via account aggregation. I can then virtually walk clients through any details of their plan as the need arises.”

Through the Client Portal, Waverly Austin is able to foster client involvement through digital check-ins on a schedule that works for each client’s preference. The Client Portal also allows them to curate reports, personalizing the experience by giving each client the information they care about most. “The flexibility of the reports and presentations helps us work in close proximity with clients,” Molina says. “They’re key in helping clients visualize their path forward.”

For Waverly Austin, eMoney is an essential solution in providing exceptional financial planning.

“We all want an engaged client, an energized staff, a repeatable customer experience, and a dependable process,” says Werner. “eMoney allows us to do high-quality work, have everyone feel a part of the process, and provide a standardized process that gives each client their own unique experience.”

Looking to Grow Your Business? See How eMoney Can Work for You

Call 1-888-362-4612 or visit emoneyadvisor.com to learn more.

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