

Baker & Associates Maximizes the Use of eMoney with Training

Baker &
Associates

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Founded in 2014



**Fee-based, registered
independent advisor**



eMoney user since 2018



Based in San Leandro, Calif.



Helping Clients Understand Their Financial Situations

To improve financial outcomes for clients and prospects, Aaron Baker founded Baker & Associates, a registered independent advisory firm, in 2014. The company focuses on strategic and financial planning for organizations, businesses, and individuals.

Determined to realize his motto, “our best client is an informed client,” Baker combines his love of financial literacy, wealth management, and financial planning to help his clients, who range from Millennials to Baby Boomers, achieve their financial goals.



Revealing the Hows and Whys of Financial Planning

Committed to helping clients achieve their goals, regardless of their financial literacy, Baker needed a financial planning solution that would reveal the hows and whys of planning instead of just presenting clients with a convoluted annual report. He wanted a platform that would model various scenarios to help clients understand the financial impacts of their decisions. Baker says, “I have an educational component to my practice. I want to help clients ask the right questions and to understand what it is I do.”

After reviewing financial planning platforms, Baker turned to eMoney. “I did some preliminary research. I was familiar with eMoney and remembered how useful it was,” he says, “so I downloaded a free trial.”

To help his business grow, he needed to get up to speed quickly with eMoney. “I come from a systems background so I knew that I could teach myself. But I’m busy running my business. I wanted professional training so I could make the best use of eMoney and help my clients learn,” he says.



Grasping Key Concepts with eMoney Training

To develop the expertise he needed, Baker attended the eMoney Planning Fundamentals Workshop, a one-day, hands-on session that covers advanced planning techniques, goal planning, impact analysis of decision-making, estate planning, and presentations.

He says, “The training covers how to implement essential financial planning concepts in eMoney, which is helping me use the platform more effectively.”

The training also provided a product overview that helped Baker understand how the platform can help him increase the productivity of his client meetings. “The in-class training provided me with a high-level view of how the tools work together. Now I know how eMoney can help me help my clients.”

With a particular interest in eMoney’s highly visual interface, he now understands which information to capture and where to store and access it. He’s also able to better collaborate with his clients to model the impact of financial choices using Decision Center.

“eMoney helps clients visualize their savings, investments, and expenditures. The training was really helpful in explaining how to show clients the possible impacts of decisions they’re considering,” Baker says.



Building Confidence and Efficiency with Quality Instruction

In addition to the topics covered in the training, Baker was also impressed with the quality of the instruction, the depth of the content, and the engagement and knowledge of the other participants.

Baker says, “The instructors provided information at the right level. They didn’t just lecture—it was a very hands-on experience, which helped the concepts sink in. And they took the time to answer questions between and after sessions. The attendees asked good questions that shed light on their approaches to financial planning. It was an engaging learning environment.”



Helping Clients Secure Their Financial Futures

As a result of attending the eMoney training, Baker feels that he can more effectively apply eMoney's capabilities. "My meetings are much more productive. In the training, we talked about meeting with clients remotely. Now, using screen sharing in eMoney, I can have two meetings in less than two hours, and they can both be very thorough," he says.

Baker and his clients are benefiting from the product and planning knowledge he gained from eMoney training. He is now better prepared to help his client base, which spans a range of ages from young parents to retirees, meet their varied financial goals.

"I'm working with a client who's just recently had a baby. We're talking about saving for their child's education right away. As a result of the training, I can use eMoney to help with those planning conversations."

In addition to helping parents secure their child's future, Baker also helps clients prepare for retirement.

"A client of mine is about to retire," he says. "During a recent meeting, I used eMoney to demonstrate some options to her. I was able to show her net worth, her investments, and her expenses. She was impressed and left the meeting eager to continue the conversation and work on her retirement options."

With help from eMoney, and its training offerings, Baker is realizing his motto, "our best client is an informed client."

"eMoney continues to exceed my expectations. With the eMoney training sessions, I'm able to maximize my use of the software to help my clients."



See How eMoney Can Work for You

Call 1-888-362-4612 or visit
www.emoneyadvisor.com
to request your free 14-day trial

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