



# DVI Develops a Personalized & Interactive Client Experience by Leveraging eMoney's Client Portal

**A CASE STUDY**

**eMoney**  
Advisor

**DVI**  
DAVID VAUGHAN INVESTMENTS



## COMPANY PROFILE

**DVI**  
DAVID VAUGHAN INVESTMENTS

David Vaughan Investments (DVI) is made up of a team of 26 experienced investment professionals who work to provide long-term investment and wealth management plans to over 800 clients. DVI focuses on helping high net-worth individuals and institutions by building and managing custom portfolios based on each clients' specific goals and financial considerations.

### DVI QUICK FACTS



Founded in 1977



Manages 2.5 billion dollars in assets



Offices in Peoria, Illinois & Winter Park, Florida



eMoney user since 2015





## PROBLEM

# Antiquated Technology Didn't Match the Firm's Client-Centric Services

David Vaughan founded DVI in 1977 with a clear mission: provide investment advice to his clients based solely on what was in their best interest. Jeff Huizenga, CFP®, ChFC, a relationship manager at DVI today, explains that the firm had this objective in mind when, in August of 2015, it started the process of reviewing its website and rethinking the way clients could interact with their financial information and data online.

"Our website was pretty old and basic and didn't get many updates," Huizenga explains. The site wasn't mobile-friendly, and it was difficult to use.

In addition to its website, the firm wanted to find a new solution for its outdated reporting and client portal tool.

*"The major issue we had with our previous provider was that it was really slow," says Huizenga. "A client would log on, click on a report, and it would just [hang]."*

DVI's previous portal also wasn't interactive and didn't provide account aggregation, so the client experience was clunky at best and somewhat manual. DVI wanted to provide clients with a personal financial website they would actually want to use.

The firm needed a dynamic solution that gave clients a unique portal and interactive system to use, and provided advisors with exceptional financial planning software capable of providing the rigorous reporting the firm required.



Jeffrey J. Huizenga, CFP®, ChFC  
Relationship Manager



## SOLUTION

# A One-Stop Financial Planning & Wealth Management Resource

DVI looked at a number of potential solutions, including NaviPlan, MoneyGuidePro, and eMoney and conducted demos of each. The fact that eMoney was not only easy to use but also extremely comprehensive made it the best choice.

“Hands down from a planning perspective eMoney is tops,” adds Huizenga. “From a planning software perspective, I don’t think there’s a piece of software that’s as good as, or goes as deep as eMoney.”

Once the financial planning software was implemented, DVI rolled out the client-facing portal, and with it, a personalized introductory experience. Instead of simply notifying clients in their next meeting or via email, the firm held a client appreciation event and used it as an opportunity to show off both their revamped website and the client-facing side of eMoney.

The firm set up stations where clients could see the new website and check out a demo of the client portal. DVI encouraged clients to sign up for the portal by pledging a donation in their name to the museum where the event was hosted.

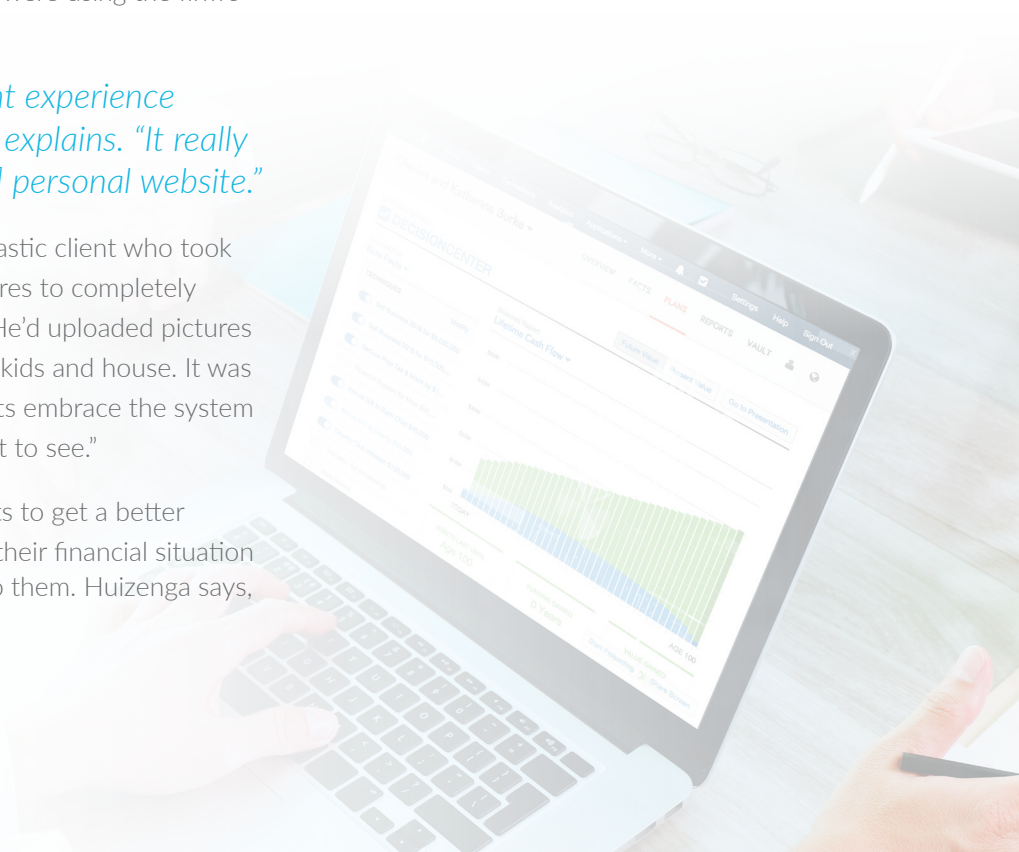
Afterwards, the firm continued to reach out and work with clients to get them on board. DVI used the client Vault to upload quarterly performance reports, which helped encourage initial adoption of the portal. “It gives them a reason to go log on and use it more,” Huizenga notes. Of DVI’s 800 clients, he says about 280 use the portal (as compared to about 100 active clients that were using the firm’s previous portal).

*“eMoney provides a client experience that’s very different,” he explains. “It really is, in a way, [the client’s] personal website.”*

Huizenga recalls one enthusiastic client who took advantage of eMoney’s features to completely customize his client portal. “He’d uploaded pictures of himself and his family and kids and house. It was really pretty cool to see clients embrace the system like that. That’s what we want to see.”

DVI wants to empower clients to get a better understanding and grasp on their financial situation and what’s most important to them. Huizenga says,

“[The decision to use eMoney] really came down to: What do we want our client experience to look like, and do we want to control it or do we want to create a kind of open architecture data aggregation experience for the client? Ultimately, we chose the personal experience.”







## RESULTS

# Better Advice and an Enhanced, Personalized Client Experience

eMoney's client portal gives DVI's clients a better understanding of their complete financial pictures in a way that's easy to digest. And as a result, the firm has seen a 130% increase in the number of clients who regularly access their portals. It's a win-win. When clients get more involved in the planning process, advisors can have more meaningful conversations on the client's goals and advise them more holistically, says Huizenga.

On the backend, eMoney has helped expand DVI's own line of sight into a client's financial situation. Advisors no longer have to rely on clients to weave together a picture of their complete financial lives by bringing in information piece by piece. Using account aggregation, advisors are able to see a client's accounts updated in real time and plan appropriately.

"[Account aggregation] is one of the big values to us as a firm," Huizenga explains. He says advisors can identify miscellaneous accounts and assets, like old 401(k)s. "We can see that 401(k) plan and actually give the client advice on that, versus saying, Oh, by the way, why don't you send us your statements when you get a chance?" This readily-available information creates opportunities to encourage clients to consolidate various assets under the firm's management.

According to Huizenga, however, DVI's deeper mission goes beyond assets.

*"We're not actively trying to move clients one way or another. We're just trying to give really good advice and do a really good job of managing their money. Clients are happy and they find ways to use us more. So we see eMoney as another way to enhance their experience along with every other step we take."*





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