

BRANDYWINE OAK PRIVATE WEALTH

Answering the ‘What Ifs’ to Secure Client Confidence with eMoney



Company Profile

Michael Henley, CFP®, CPWA®, CRPC®, RMA®, Founder and CEO, and Alison Brooks CFP®, CRPC®, Co-founder and COO established their registered independent advisory firm in 2018, dedicated to helping families plan and manage all aspects of their finances and investments.

 **6 Private wealth advisors**

 **\$622M in AUM (as of July 2019)**

 **eMoney user since 2018**

 **Located in Pennsylvania**

“The freedom to best serve clients and find for them whatever solution best fits their needs wouldn’t have been a reality without breaking away. It’s allowed us to really focus on them as a whole.”

Co-founder,
Alison Brooks

See How eMoney Can Work for You

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

Exploring the What Ifs...

Both Henley and Brooks can attest that the idea to leave the wirehouse, where they previously worked together, wasn’t one they took lightly. Brooks recalls, “The decision to go independent had to align with what was best for us and the families we worked with.” They did their research and explored their own what-if scenario as entrepreneurs looking to break away.


Choosing the Right Financial Planning Tech

Brandywine Oak’s mission is really to do the best they possibly can in serving families. The founders believed technology could support their vision of providing clients a holistic planning experience. From their time at the wirehouse, they knew they wanted something interactive to easily manage client questions. After demoing several products, they were quickly able to envision how eMoney would be a strong differentiator for their practice—giving them the ability to show tangible outcomes from various strategies and engage clients with secure reporting and document sharing.

 **Tested 3 financial planning platforms**

 **Spent ~24 hours across product demos**

 **Obtained 8 user licenses for firm usage**

 **Held weekly training sessions for adoption**

Securing Client Confidence and Loyalty

Clients—new and existing—have been pleasantly surprised with the planning features and their customized client site. The team finds that much of their day really involves using eMoney as families want to continuously address questions about their life. Whether clients are deciding if they want to move, retire, or if they can afford a certain trip, these kinds of scenarios can be modeled with actual data behind them. The robust platform has helped the firm grow their planning capabilities and in turn, shifted clients to concentrate on the long term.

Looking Toward the Future

Choosing eMoney as a service partner has allowed the firm to enhance relationships with current clients, as well as attract new families that want to engage in planning.

“So I think we’re really fortunate to have this platform to show them,” Brooks said. “I think our return on investment [with] eMoney is not just quantitative, it’s not something you just put in terms of dollar form, it’s really more in terms of the reward that you see in working with your clients themselves.”