

BURNS, TOUSSAINT & ASSOCIATES

# Accelerating ROI Through Coaching



**BURNS, TOUSSAINT  
& ASSOCIATES**  
Prosper With Purpose.

Based in Seattle, Burns, Toussaint & Associates (BTA) is an independent advisory firm, founded by former college roommates, Wesley Burns, CFP®, CLU®, and Antoine Toussaint, CFP®, CLU®.

After building their careers at a national financial institution, they broke away in 2019 to live out their vision: challenge clients to dream big about their lives and legacy and help those ideas come to fruition through comprehensive planning. Helping to create and manage plans those plans is Joleen Powell, CFP®, CLU®, director of planning and client servicing for the firm.



**Affiliated with LPL Financial**



**Office of four CFP® professionals**



**\$170M in AUM (as of September 2020)**



**Located in Washington**



**eMoney user since 2020**

*“We had a similar offer from another tech vendor, but it wasn’t presented as, ‘We really recommend you work with us in three or four one-hour sessions.’ It was like, ‘Hey, reach out to us whenever you want.’ The way eMoney offered support just felt different, and after a month or two, I know a lot more about eMoney than I know about that other tool.”*

*-Joleen Powell, CFP®, CLU®*

## The Getting Started Program

BTA’s decision to go independent marked considerable change for the firm, including the need to adopt many new technologies and adjust quickly for a smooth client transition. Powell was encouraged when she received outreach from eMoney about the ‘Getting Started Program.’ She realized this personalized success coaching approach would be an invaluable way to partner with eMoney to get her, and their firm, the exact insight they needed to enable and scale planning for their business.

## Learning with Intent and Trust

Powell’s goal was to become the eMoney power user for her firm. For her the software was intuitive, but the one-on-one support of a trusted expert helped her build confidence, customize workflows according to the firm’s collaborative nature, and develop plans as an interactive client experience, particularly with their Client Portal.

## Collaboration for the Win

For each session, the trainer provided an agenda and guidance on how to best prepare—even encouraging the use of a current client or plan, and requested that Powell “drive” the software to benefit from hands-on experience. Powell learned how to navigate the robust features, as well as best practices for planning efficiency from her coach’s deep knowledge.

*“I was intentional about loading real plans. I wanted to have enough data in there to produce specific examples of questions I was running into since I knew it would be an opportunity for my coach to offer feedback.”*

*-Joleen Powell, Director of Planning and Client Servicing*

## Executing the Vision

In a short time, Powell has seen how eMoney has enhanced their planning to uncover new areas of growth for the firm, especially with estate planning for multi-generation families. Now, BTA is empowered in their mission to offer “Prosper with purpose” for their clients while pursuing opportunities to bring on new clients in need of impactful financial plans.

### See How eMoney Can Work for You

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or call us at 888-362-4612.