eMoney | CASE STUDY

ESLICK FINANCIAL GROUP

Maximizing the Benefits of Creating a Dynamic Client Experience

Eslick Financial, a practice led by Dennis ("Denny") Eslick ChFC® RICP® CLU®, and his son Kevin Eslick, ChFC® RICP®, has been evolving its services for decades. From providing insurance products, to investment management, to holistic wealth planning, the Eslick team has remained at the forefront of delivering upon the needs of their clients.

Central to their progression of offering clients comprehensive financial planning was technology. It wasn't until they began implementing the eMoney solution that they realized how it could transform their business.

Securities and Investment Advisory Services Offered Through M Holdings Securities, Inc. A Registered Broker/Dealer and Investment Adviser, Member FINRA/SIPC. Eslick Financial Group is independently owned and operated. #3541806.1

Member firm of M Financial Group

Located in Iowa

Serving 125 planning clients

eMoney user since 2013

"We landed on eMoney because we saw the industry evolving to focus more on the client experience and planning, instead of product. And so eMoney was a natural fit for that, and I think it worked out well for us."

-Kevin Eslick, Advisor, ChFC® RICP®

See How eMoney Can Work for You

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

Creating Organic Growth with Planning

When the Eslick team began building plans with eMoney they started with their existing client base. Kevin found that by offering the Client Portal and giving 24/7 access to accurate information, clients became very motivated to have that full-picture view of their wealth. As a result, clients became more open about disclosing their assets, which led to new opportunities.

The Decision Center in eMoney allows the team to show the client the impact of something happening without proper coverage in place, exposing any shortfalls for that client. Their ability to successfully visualize these scenarios for clients has led to a number of sales for policies or coverage that weren't previously explored or considered.

Planning in Real Time

With eMoney came a shift from investment reviews to plan reviews. Conducting client meetings with eMoney means the focus stays on the client's long-term plan and how their investments fit into the plan.

Having accurate account and financial data in eMoney creates a more seamless experience for clients—who are no longer asked to submit updated statements—and saves Denny and Kevin time with meeting preparation. Now, that time is used to identify potential issues or evaluate top priorities for an interactive planning discussion.

"Our clients benefit from industry-leading technology that brings their plans to life. We believe decision-making becomes easier when you can visualize the impact of your choices." -Kevin Eslick, Advisor, ChFC® RICP®

Ready for the Future

While the long-term view is something Eslick promotes with their clients using eMoney, the technology has also given their firm the ability to build for its future.

Eslick Financial set up integrations with the software to streamline other business operations, like their CRM and portfolio management performance reporting, so that eMoney is their central platform. By taking an intentional and integrated approach with eMoney, they can easily transition relationships to provide continuous client service in their practice.

The value that clients see from comprehensive planning has even changed their source of referrals. The bulk of referrals used to come from centers of influence like attorneys and accountants, but now clients are more likely to refer their family and friends because of their positive experiences.