

THE COLUCCI GROUP

# Finding the Capabilities and Confidence to Break Away with eMoney



*“Dealing with the futures and livelihoods of people that I’ve gotten to know. I really wanted it to just be myself and the client aligned with one another,”* states John Colucci, CRPC®, managing director and independent advisor of The Colucci Group.

The faith and trust of his clients was the catalyst for Colucci to achieve independence and remove the third-party institution—mandating goals, quotas, and product preferences—from his relationships three years ago. As an independent firm, he now has the flexibility to consider all options from all providers for his clients to deliver a customized and consistent experience that goes beyond investment management.



**The Colucci Group is a partner of Alden Investment Groups**



**Located in New York City, NY**



**Serving clients in New York, California, Florida, Illinois, Pennsylvania, and Washington DC**



**eMoney user since 2018**

*“I really like to look into many different hypotheticals. All the plans that I run are laden with what-if scenarios, so I found eMoney to be absolutely great.”*



- John Colucci, CRPC®  
The Colucci Group

## See How eMoney Can Work for You

Learn more at [emoneyadvisor.com](http://emoneyadvisor.com) or call us at 888-362-4612.

## Choosing the Financial Planning Technology

Going independent gave Colucci freedom in many areas of his business, including the option to choose his technology stack. He knew financial planning software would be an integral component of his vision for holistic wealth management. *“I was looking for more cash-flow-based solutions, and eMoney came really highly recommended,”* Colucci recalls.

Having now used the technology for a few years, Colucci is most impressed with the amount of data one can use for thoroughly robust planning. He affirms, *“It’s a financial planner’s financial planning tool.”*

## Support When You Need It

As an independent practitioner, Colucci has learned the planning technology through his own trial and error. If he gets stuck on something or doesn’t know how to do something in the most efficient manner, he calls eMoney for service and support.

*“I have found that I could spend the next 10 hours of my life building something out, but if I call eMoney they understand my objectives and walk me through how to get it done. That to me is the biggest difference-maker in eMoney as a technology partner, not just a technology provider.”*

- John Colucci, CRPC®, The Colucci Group

## Instilling Confidence in the Planning Recommendations

The Colucci Group strives to offer personalized service. The situational analysis he does for clients provides them with peace of mind and the software gives him the confidence to show or tell them what they need to know. *“I sometimes say to clients, ‘It’s because I’ve looked at every other combination of that within reason, and this is the one that came out better.’”*

Aside from the models that help string these concepts together, Colucci sees how eMoney engages his clients in planning. The Client Portal is great to bridge parties—whether it’s spouses or multi-generations of families—the information shared in eMoney helps them understand their situation and how they may benefit from a financial plan.

He believes the eMoney tools help his clients visualize how financial planning provides a foundation for healthier financial living going forward.