

eMoney | CASE STUDY

Vincere Wealth: 400% Revenue Growth with eMoney

THE CUSTOMER >

THE GOAL >

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THE RESULT >



**A winning mindset:
Vincere is Latin for “to win” or “to conquer.”**



95%
firm retention rate

\$500M

AUA including
stock options and
cryptocurrency

\$40M

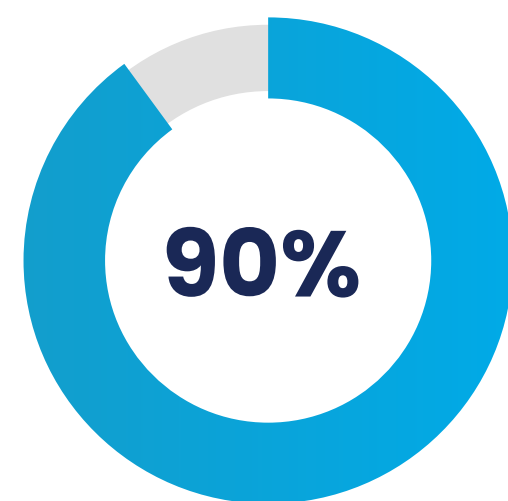
AUM as of
7/31/2022



9 advisors
on staff



2 advisor podcasts
(Happy Hour Money
and Vet Success)



share of clients with
a comprehensive
plan in eMoney



3 years as an
eMoney client



6

client niches:

- tech executives
- business owners
- veterinarians
- dentists
- crypto investors
- real estate investors

FIRM PROFILE



Established

2017, eMoney client since 2019



eMoney Product Used

eMoney Pro



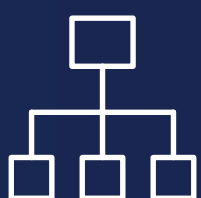
Locations

Indiana, California, Montana, Texas, and Utah



Business Model

Fee-only financial planning and investment management, and flat-fee planning



Team Size

9

THE GOAL

While working for a traditional investment firm, Josh Bennett, CFP®, EA, became frustrated by the limitations of the practice's minimum investment requirements—if someone didn't come in with at least half a million dollars, he couldn't really help them. As Bennett explains it:

“I was working in the heart of San Francisco where there were lots of young people making really good money who would be great long-term clients, but I couldn't give them the time of day. That never sat well with me.”

This frustration led Bennett to found Vincere Wealth—a fee-only financial planning firm with a focus on serving clients who were being neglected by the larger players in the industry. Bennett charges a flat fee for a financial plan to help establish young, high-potential clients on a path that will evolve with them.

In the interest of increasing his firm's reach, in 2020 Bennett merged Vincere with a firm founded by Isaiah Douglass, CFP®, MBA, CEPA. Douglass had started his independent practice two years earlier with a mission to serve dentists and veterinarians—also underserved groups that meshed well with the Millennials Vincere was helping.

Robust Financial Planning Support

As holistic financial planners, Bennett and Douglass appreciate how granular their analyses can get using eMoney. “I was using another planning software that didn't have the bells and whistles I was looking for,” Bennett said of the switch to eMoney in 2019.



When we started using eMoney, we had more success with the type of intricate planning we wanted to do.”

—Josh Bennett



eMONEY PLANNING EXPERIENCE

THE SOLUTION

Cash-flow planning really resonates with Vincere clients. The advisors can walk them through their plans visually, so they understand exactly what's needed on their part to be successful.

“The cash flow planning capabilities of eMoney give it an advantage over other financial planning software. To me, everything starts with cash flow. If you don't have money to save or you're spending too much, you can't invest. That was a big reason we chose to work with eMoney.” —Josh Bennett

Clients also benefit from eMoney's advanced capabilities when it comes to stock option planning, comparing Roth and traditional IRAs as well as analyzing a move to another state. But it's the Decision Center where Bennett and Douglass spend most of their planning time. When clients come to them with questions, they know that Decision Center modeling will ease client conversations.

Giving Clients Peace of Mind

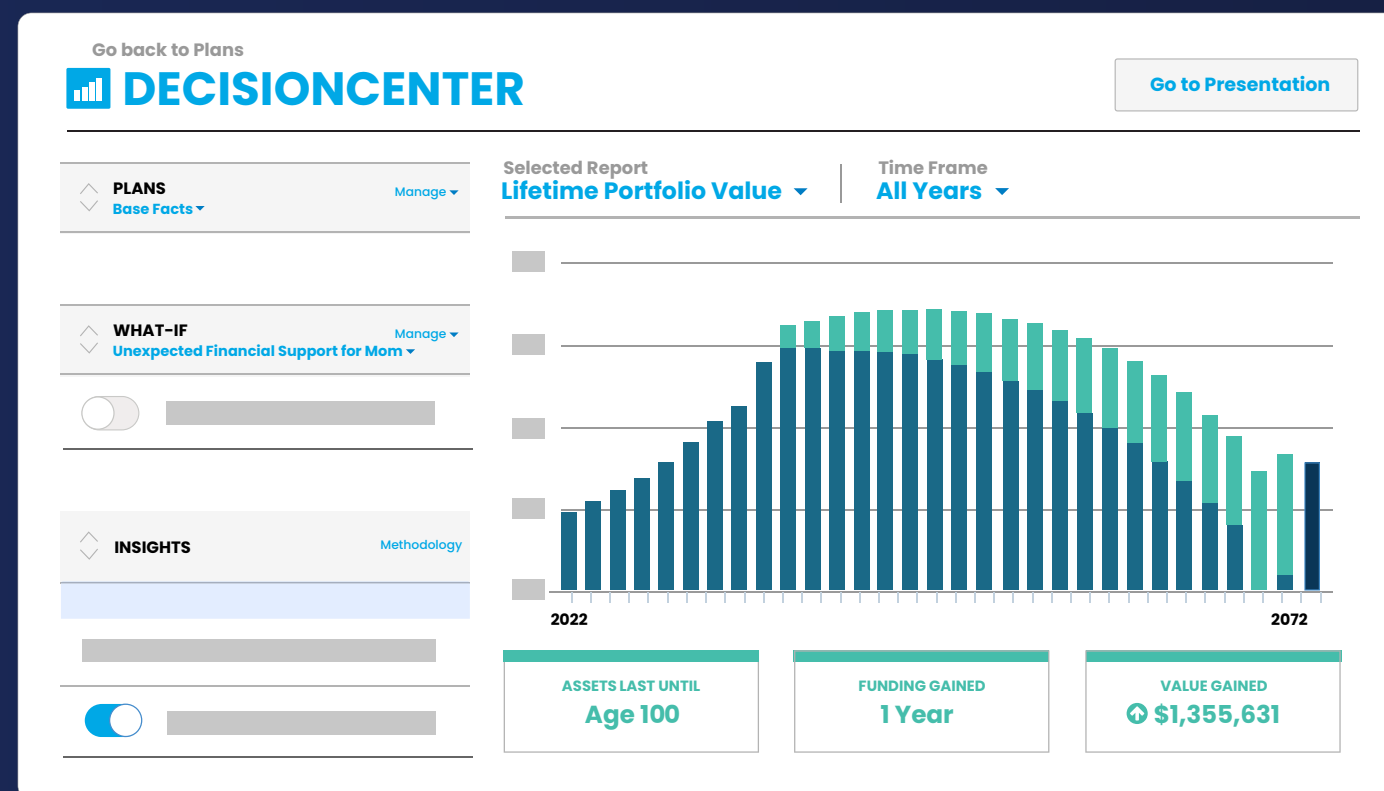
Bennett and Douglass have found this method of planning to be helpful when clients feel they aren't where they want to be with their finances. As Douglass points out, “I think every client voices their desire to do better when it comes to finances. eMoney lets us show clients how to improve their performance.”

Again, this is where the Decision Center plays a crucial role. The software's interactive capabilities contribute to the Vincere client experience.

“We have what we call our collaboration meeting, during which we walk the client through different changes and adjustments to show in real time how these impact the plan. It helps the client visualize that, ‘Oh, if we make that one change, everything else works.’” —Isaiah Douglass



90% of clients have a comprehensive plan in eMoney



A specialized focus on stock option planning



Our long-term vision is to continue to build out resources and be the go-to place for Millennials who need help with their money. We know eMoney will play a part as we continue to scale, grow, and refine.”

—Josh Bennett

THE RESULT

Since the merger of Bennett's and Douglass's practices, Vincere has seen remarkable growth. Bennett appreciates the role eMoney has played in that growth, and how it has continued to evolve alongside the practice. “We've been very pleased with all the consistent improvements to the user interface and the Decision Center.”

Since 2021, Vincere has seen a 400 percent increase in revenue and the addition of seven advisors now serving about 450 households.

A Partner in Future-proofing

Vincere has positioned itself as a firm where people can come in and have real conversations about money that don't feel stuffy or forced. The team gives clients the confidence to share what they want their lives to look like and then uses eMoney as a tool to show them how that can be achieved. After gathering a client's data and walking through various assumptions, the team can give clients the clarity of having a plan to accomplish those life goals.

“There's a lot of discussion around the upcoming wealth transfer. That's going to happen, and we want our clients to know they can just ask and get what they're looking for. We have no expectation on our end with clients to be at a certain level—we'll meet them where they're at.” —Isaiah Douglass

Looking to Grow Your Business? See How eMoney Can Work for You

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