

BRIDGEWORTH WEALTH MANAGEMENT

Data Entry Services Help Bridgeworth Wealth Management Migrate Platforms with Ease



BRIDGEWORTH
WEALTH MANAGEMENT

Comprehensive financial planning is at the heart of Bridgeworth Wealth Management's service offering. Bridgeworth Wealth Management is a Registered Investment Advisor with over 30 years of industry experience, they stand behind the value of a thorough and regularly updated financial plan. Led by a team of CFP professionals, Bridgeworth's switch to eMoney reflects their desire to continue expanding their planning capabilities for clients.



Founded 2008



Over \$2 Billion AUM as of March 2023



25 advisors



2,700 households served



Based in Birmingham, AL; additional office in Huntsville, AL

"We're incredibly happy with how this project turned out. eMoney took on a massive migration with only a little strategic direction from our team, which was a huge time savings for us.

We could not ask for a better experience."

- Jonathan Millican, CFP®,
Financial Advisor and Director
of Planning at Bridgeworth
Wealth Management



See How eMoney Can Work for You

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

Addressing the Need to Migrate Data Between Platforms

Millican and team were migrating their data to eMoney for all advisors in an effort to standardize software usage across the firm. While planning software was an operational linchpin, they'd been delaying the project due to the size of the migration.

"Once we started talking to eMoney, we quickly realized what we thought was unmanageable was actually quite manageable," Millican said. "Then there was a lot of energy behind this project. Everyone was excited to make it work."

Communication Is Key for a Large Migration

After a few meetings to discuss the scope and goals of the project, the data entry team at eMoney was able to successfully implement a plan to migrate all of Bridgeworth's data with a high degree of accuracy. This included Vault files, client information, Facts, Plans, and Presentations.

Data migration stats:



187,563 data points



3,216 clients



5,541 hours saved

"Everyone I spoke with was very clear on what data would move and where," Millican said. "The communication was great. I even got answers for the questions I didn't know enough to ask."

Data Entry Experience Keeps the Project on Schedule

Millican and team appreciated eMoney's experience in guiding them through this project. "I felt a lot more comfortable when it was clear the team had done this before and we were not blazing a new trail," Millican said.

The project was completed slightly ahead of the agreed upon schedule, with Bridgeworth's team ready to use eMoney with clients right away.

"When it's a system like eMoney that's so important, you want to make sure everybody speaks the same language," Millican said. "It was evident that everybody at eMoney did. They knew our concerns and how this could impact clients and that's what made this project go exactly to schedule."