

eMoney | CASE STUDY

Doyenne Wealth Advisors: An IQ + EQ Approach Powered by eMoney

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Company Profile



Established
2022



eMoney User Since
2022



eMoney Product Used
eMoney Pro



Location
Headquartered in Chicago

Sophisticated, fiduciary wealth advice

5 Founders:

Mary Claire Allvine, CFP®, MBA

Kristin Balon, CFP®, MBA

Kate Donaldson, CFP®

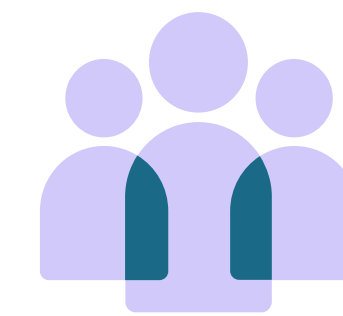
Anne Petty, CFP®

Laura Stern, CFP®, CFA, MBA



\$1.5 Billion

AUM



18

team
members
(7 advisors)

Over 150 clients in 31 states

100% Certified: Every advisor is a Certified Financial Planner™ professional, and all advisory employees at Doyenne are required to become CFP® practitioners during their tenure.

"When we started Doyenne, I knew we needed a solution for serious quantitative scenario planning in our IQ work. eMoney allows us to do Monte Carlo analysis and explore many scenarios. The Doyenne EQ is then in choosing the most impactful information to present to the client."

-Anne Petty, CFP®

The Goal

Founded by a group of like-minded colleagues in 2022, Doyenne Wealth Advisors is committed to providing top-notch wealth management advice that helps clients live life to the fullest.

Mary Claire Allvine, CFP®, MBA, is the CEO and a Managing Director. She says the practice draws high-net-worth clients who come to them with a weight on their shoulders: "They have achieved a certain level of comfort and wealth, but they want to know how to best steward that wealth for themselves, their spouses, the next generation, or their community."



Doyenne Wealth Advisors embraces an IQ + EQ approach to serving wealthy families. This type of financial planning combines financial intelligence with emotional intelligence, which they believe allows the advisors to be exactly the financial guide their clients' lives require. This calls for a sophisticated software solution that can meet the demands of a variety of clients.

The five founders and their experienced advisory team were eMoney users before Doyenne existed. They knew from the start that they could rely on eMoney to provide the financial intelligence needed.

Anne Petty, CFP, has relied on eMoney for more than a decade. "When we started Doyenne, I knew we needed a solution for serious quantitative scenario planning in our IQ work. eMoney allows us to do Monte Carlo analysis and explore many scenarios. The Doyenne EQ is then in choosing the most impactful information to present to the client."

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-Kate Donaldson, CFP®

The Solution

The Doyenne team leverages the comprehensive nature of the eMoney platform from the beginning of a client relationship. “When we first start working with a client, they are typically trying to get a handle on their wealth and the freedom they have built for themselves,” Kristin Balon reports. “It’s difficult for a client family to look at a number like \$15 million or \$25 million and understand what they can do with it.”

Using the eMoney Decision Center and Advanced Planning features, the Doyenne team helps clients chart their journeys. “It’s a rigorous process in the first year to create a plan. We’re helping them with big decisions—whether they can sell their business or walk away from a big executive job,” Kate Donaldson explains.

“Our clients come to us with a list of wishes and want to know if they are on the right path to fulfill them,” Allvine explains. “eMoney helps us see which wishes are possible.”

Laura Stern, both an advisor and a Chartered Financial Analyst (CFA), notes that “eMoney has been a powerful solution for us in terms of modeling client scenarios.”

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— Laura Stern

Advisor and Chartered Financial Analyst (CFA)



"We love how much data we get out of eMoney. We can analyze dozens of client scenarios," Petty says. "The art of being an advisor is understanding and selecting which bits of information will be meaningful and actionable for the client."

-Anne Petty, CFP®

The Results

With the financial intelligence they get from eMoney, the team uses their EQ to translate the data into information clients can use.

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"As advisors, we really dig into the data provided by eMoney's various scenarios. Clients rely on our ability to translate that data into actionable decisions and compassionate advice," Donaldson notes. "eMoney allows us to devote Doyenne time to what Doyenne does best."

"eMoney allows us to devote Doyenne time to what Doyenne does best."

— Kate Donaldson, CFP®
Managing Director, CFO



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

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