eMoney | CASE STUDY

ABACUS

ABACUS WEALTH PARTNERS

Empowering Teams with eMoney Training

Abacus Wealth Partners, a Registered Investment Advisor with over 20 years of industry experience, began with a vision to be a catalyst for people to not simply build wealth, but to live a more fulfilling life. As a purpose-driven financial advisory firm, Abacus delivers values-aligned financial planning and investment management.

eMONEY USER SINCE 2020

OVER $3 BILLION AUM

70 TEAM MEMBERS

1,500+ CLIENT HOUSEHOLDS

"The training resources helped me discover the powerful capabilities of the software. Continuous learning is very important to me, and there is something new to learn in every eMoney training I attend."

—Tachelle Nettles, Paraplanner at Abacus Wealth Partners

THE GOAL

Abacus Wealth Partners works alongside their clients to develop a holistic financial plan and investment strategy tailored to their goals and in harmony with their values. Their team-based approach ensures that their clients have a robust support system while receiving personalized service. Being at the heart of their tech stack, it's critical that all advisors know how to maximize the potential of eMoney to give clients a consistent, impactful experience.

THE SOLUTION

Tachelle Nettles supports the firm's financial advisors and applies her knowledge of their wealth management technology in her role as a paraplanner. When she first started at the firm, Nettles wanted to make sure she was comfortable with the eMoney platform. She leveraged a variety of eMoney virtual learning resources to build her expertise, including the Core Concepts Series, Intermediate Series, Advanced Series, and the Product Updates offered by the eMoney training team.

"The best part of the learning experience was discovering the power of eMoney," Nettles says. "It is a really powerful tool and I could explore its capabilities and how to best model everything that we want to model."

THE RESULT

Nettles can now act as an in-house leader on the eMoney platform and trainings. She ensures that everyone at Abacus knows about the training services that eMoney offers. When new advisors are onboarding, they're advised to start with the Core Concepts training series to become comfortable with eMoney and then move on to the more advanced training options and specific topics that they're interested in.

"The trainings, webinars, and blog are all resources I make sure that our advisors know are there," Nettles said. "I always try to highlight the different trainings that are available to them so they know where to go for the latest information."

Nettles leverages the skills she gained in the trainings by offering guidance to her team. Advisors reach out to her with questions, and she can provide support in their planning efforts. "It's nice for them to be able to just ping me and ask a question," she says. "What I learned is helping me help other advisors better serve their clients."