eMoney + GLENMEDE

CASE STUDY

The Glenmede Trust Company: Scaling Complex Wealth Planning with eMoney

THE CLIENT ›

THE GOAL ›

THE SOLUTION ›

THE RESULT ›

The Client

The Glenmede Trust Company: Empowering Financial Futures

AUM **$49.4 billion** as of 7/31/2026

70+ years of experience

10x increase
in financial plans created annually since adopting eMoney



4:1
client-to-employee ratio



9 offices
serving clients across 50 states

Firm Profile

ESTABLISHED
1956

eMONEY USER SINCE
2014

PRODUCT USED
eMoney Pro

LOCATION
Philadelphia, PA

TEAM SIZE
430+ employees

The Goal

Glenmede Trust is a privately held and independently owned wealth and investment management firm focused on delivering comprehensive, long-term advice to high-net-worth individuals, families, family offices, endowments, foundations, and institutional clients.

Glenmede's business model is client-first and advice-driven, with financial planning central to how they deliver value. The firm strives to help clients understand the complex relationship between goals, investments, risk, and wealth planning through their proprietary Goals-Based Wealth Management Process.

Susan Black, Wealth Planner and Director of Wealth Planning Technology, joined Glenmede in 2014 to bring the wealth planning department to the next level. At the time, the firm was using antiquated technology that limited their capacity to scale while maintaining quality and personalization.

With the goal of expanding access to financial planning across its client base, Glenmede needed technology that could support sophisticated planning needs without creating additional operational complexity for advisors.







“eMoney allows us to model complex planning scenarios in a way that’s both powerful and intuitive. It handles multi-goal planning, Monte Carlo Analysis, detailed cash flow analysis, and what-if projections very effectively, which is critical for the types of decisions our clients are making.”

— SUSAN BLACK, WEALTH PLANNER AND DIRECTOR OF WEALTH PLANNING TECHNOLOGY

The Solution

Glenmede’s approach to financial planning is holistic, goals-based, and highly personalized. It is an ongoing process that develops as clients’ lives evolve and their circumstances change. They selected eMoney as their financial planning technology because it aligned with their planning philosophy and provided the level of sophistication their clients require.

eMoney is now embedded throughout Glenmede’s entire financial planning process, enabling the firm to:

- **Scale comprehensive planning across complex client relationships:** Wealth planners leverage eMoney extensively throughout the planning process to establish a clear picture of the client's financial life, stress-test strategies, and evaluate tradeoffs around retirement, spending, gifting, and major life decisions all within our lifestyle, legacy, and philanthropic framework.
- **Improve collaboration across multidisciplinary teams:** Each client team, which includes wealth advisors, portfolio managers, and wealth planners, works from a shared planning framework, with the goal of improving consistency, alignment, and efficiency.
- **Create more engaging, interactive client conversations:** Clear visuals and real-time modeling help clients understand complex planning concepts and participate more actively in decision-making.

> “Our planners appreciate the depth of the planning capabilities and the flexibility to handle complex situations, and our relationship managers value how clearly the results are communicated. The visual presentation of the tools helps simplify the complex planning concepts and makes them more engaging for clients.” —Susan Black, Wealth Planner and Director of Wealth Planning Technology

“eMoney has really supported our ability to scale planning without sacrificing quality.”

— SUSAN BLACK, WEALTH PLANNER AND DIRECTOR OF WEALTH PLANNING TECHNOLOGY

The Result

eMoney has empowered Glenmede’s wealth planning team to deliver comprehensive financial plans at scale and improve their client experience with deeper, more meaningful conversations about what matters most to them.

Since adopting eMoney, Glenmede has increased annual plan creation from approximately 100 to nearly 1,000 plans per year. The platform has helped the team become more efficient and consistent in their planning delivery, supporting the tenfold increase in annual plan creation without compromising the quality or personalization of the planning experience.

This dynamic, client-centered approach to planning helps clients gain greater clarity and stay more engaged with the planning process. Instead of having abstract discussions, the team grounds the conversations in clear visuals and data. Clients can see how decisions affect their long-term outcomes, which builds confidence and trust in the planning process.

"eMoney has been a game changer for Glenmede. It has transformed the way we engage with clients and made a remarkable difference in the quality and depth of our conversations."

—Susan Black, Wealth Planner and Director of Wealth Planning Technology



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

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