

# eMoney Advisor Client Success Story: Strategic Advisory Services, L.P.

## Challenge

Strategic Advisory Services, L.P., located in Houston, Texas, has been a Registered Investment Advisory firm for almost 25 years. Focused primarily on wealth management, the firm's founder and President, Dick Grbac, CFP, is always interested in finding new technologies to improve his financial services

practice. Grbac was using several programs for modular planning but saw a hole in his technology after learning how account aggregation could help him attain a holistic view of his clients' assets.

## Solution

While attending a Ron Carson Peak event, Dick saw a demo of eMoney 360 Pro and was impressed with the system's ability to aggregate client assets and deliver a branded client site. "I was interested in eMoney for aggregation and the Personal Financial Home Page. At the time we were focused primarily on asset gathering, so we were not interested in eMoney for planning," Dick commented. "I tested eMoney on a select group of clients who were engineers. I knew they would get highly involved with the system and play around with it. Their response was very positive."

the firm continued to use Money Tree to conduct financial planning. After all, Strategic Advisory Services, L.P. had been a loyal customer of Money Tree for almost 15 years.

After the engineers' positive response, Jeremy Joiner, CFP, the firm's Associate Wealth Advisor, set to work fully integrating the eMoney system into Strategic Advisory Services, L.P. In the beginning, while Jeremy focused on the eMoney system,

As Jeremy became more familiar with eMoney's capabilities, he wanted to try using the system for planning. A Texas Tech grad, Joiner had first-hand experience using some of the most popular financial planning tools while pursuing his degree in Personal Financial Planning, and he was impressed with the eMoney system: "I was amazed at how easy it was to use. The estate reports were easy to decipher, and the what-if scenarios made my job a breeze. I saw that eMoney could do more for us than any other provider we were using. We have cancelled our subscriptions to Money Guide Pro and Money Tree."

## Benefit

Strategic Advisory Services, L.P. now utilizes eMoney 360 Pro to the fullest, benefiting current clients and attracting new business to the firm. According to Jeremy, "eMoney has given us something incredible to offer." Especially in their new marketing strategy targeting highly compensated professionals, Jeremy and Dick show off eMoney as a value added tool for their firm. They have developed a sample client on eMoney that allows prospective clients to see a 'living, breathing' example of their work. "What makes us different

from other firms is that our plans are live in real time."

With the system's alerts, they have even found a way to better prepare for client reviews. "We can see from the Client Login Alert how frequently clients are accessing their information. If they are logging on regularly, we know they are going to have more detailed questions for us, which helps us to be better prepared for their meeting."