

Case Study

Fully Remote & Fully Capable

EXECUTIVE SUMMARY

Mark Hannah had been wanting to run client meetings remotely for years, and the discovery of Asset-Map gave him the ultimate tool he needed to make his dream a reality. Learn how his client experience has changed by putting Asset-Map at the center.

“

“Asset-Map gives me ease of data entry, easy oversight, and simple management over the entire client meeting process. My day is optimally spent front-and-center with clients, and Asset-Map makes the comprehensive planning behind-the-scenes easy, so I can spend more time with clients.”

”



THE DO-IT-YOURSELF APPROACH

Mark Hannah, CFP®, has roots in financial services that go all the way back to his college days, when he earned his Series 7 license the day before he turned twenty-one. After starting his post-graduate career at an online brokerage firm, Mark used his connections in the business to join Equitable Advisors in 2001. He then formed Evergreen Wealth Strategies in 2012 as a team of four advisors dedicated to serving middle American families and investors with a comprehensive planning approach.

THE PROBLEM: FINDING PLANNING TOOLS BUILT FOR CLIENTS

Early on in his career, Mark knew that he wanted to offer comprehensive planning services to his clients, but all too often the software options for planning limited his ability to do that in an easy-to-understand way.

“

“The planning tools I used were either too difficult, too narrow, or built for a different type of clientele than the one we serve at Evergreen,” he said. “We used a specific platform but we found that it took our team too much time to enter in data, and it didn’t provide reports that our clients could grasp quickly.”

”

In Mark's opinion, the planning software on the market was built to cater toward advisors and give them tools to build complex plans, instead of being built for the client to understand their plan once it was created.

His perception of what was possible, though, changed once he found Asset-Map.

A QUICK TRANSITION

One of Mark's partners brought Asset-Map to him and all it took was one client meeting to convince him that it was the only planning technology he needed.

“I showed one client and their reaction was immediately positive,” Mark said. “I asked what they thought at the end of the meeting and they said they loved it. After that, we transitioned 100% of our clients to Asset-Map and use it in every relationship now.”

That conversation happened five years ago, and the usability of Asset-Map in Evergreen's office has only gone up since then.

EMBRACING THE REMOTE FINANCIAL ADVISOR LIFESTYLE

Mark saw the potential of the financial advice industry to move to a digital-first approach in the early 2010s, but it wasn't until after he implemented Asset-Map that he completely took his clients meetings in a remote direction. He now uses Asset-Map as his primary presentation platform for meetings.

“My work is predicated on the ability to provide good advice; that isn't enhanced by driving 45 minutes to a client meeting,” he said. “Asset-Map gives me one page to show a client's financial situation, and one more page to go through their goals with Target-Maps. Instead of printing stacks of paper, we can look at two pages and do it all virtually.”

In addition to increasing his efficiency, a virtual meeting setup also allows Mark to fit his business practices with shifting expectations. He has found that most clients, including those already well into retirement, now expect to do things digitally.

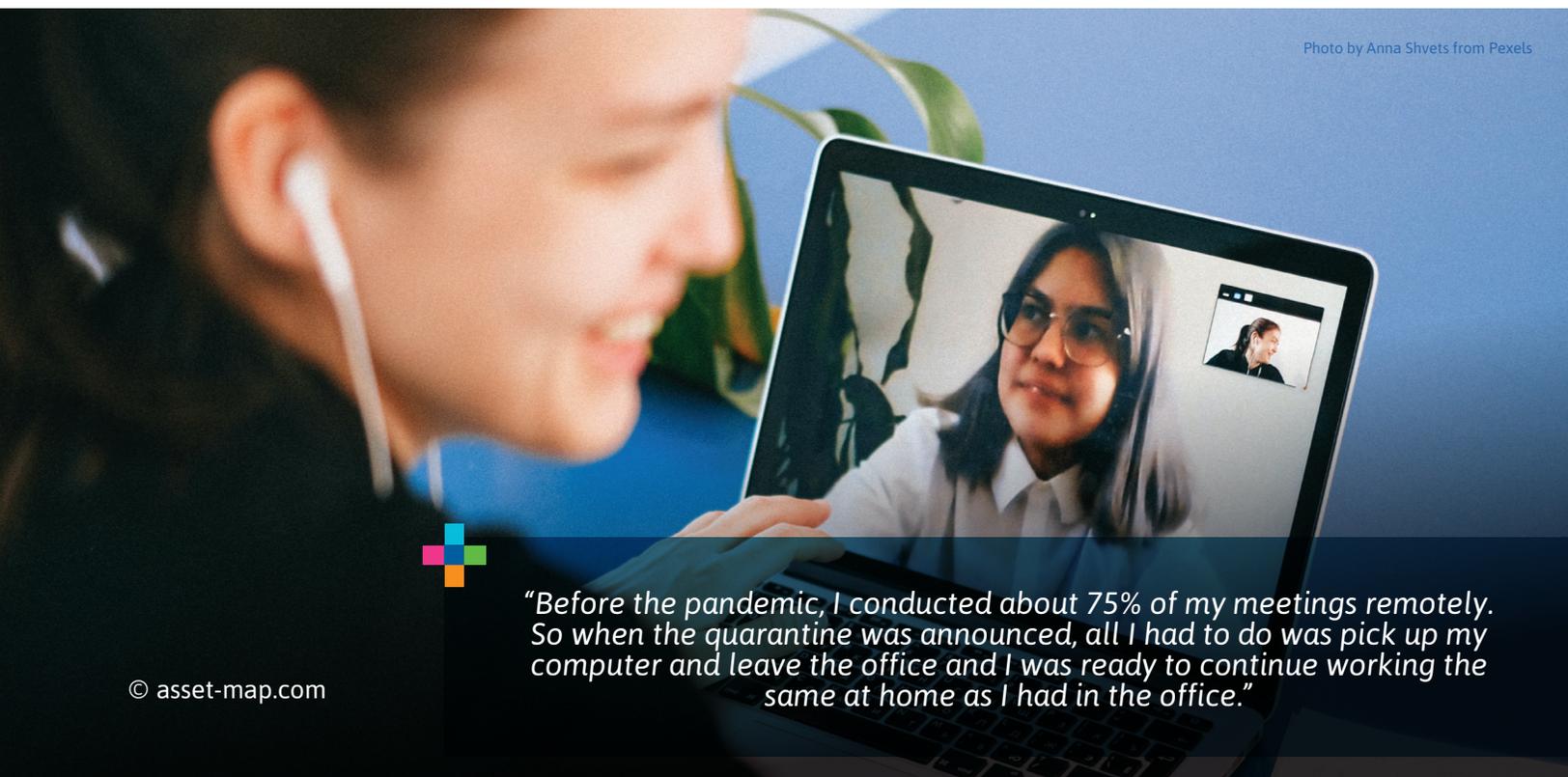
PREPARED FOR ANYTHING

Since implementing Asset-Map, Mark has seen his business grow and his client conversations become more productive. There's one story in particular that succinctly illustrates how Asset-Map has changed client expectations about their financial plans.

One client, whom he had never met in person, asked if she could see her “stick figure picture” to look at her updated numbers. “When someone gives a special nickname to a report like that, it means it has made an impact on them,” he said.

Using Asset-Map as a core piece of his tech stack also meant that Mark was prepared to go fully remote once the COVID-19 pandemic crossed American shores.

Photo by Anna Shvets from Pexels



“Before the pandemic, I conducted about 75% of my meetings remotely. So when the quarantine was announced, all I had to do was pick up my computer and leave the office and I was ready to continue working the same at home as I had in the office.”