



WHO

ESTABLISH OWNERSHIP

Enter a person, entity, business, or anything that can own something.

- Family Information
- Entities
- Business Interests
- Trusts & Partnerships



WHAT

WHAT IS OWNED

Enter anything that is owned.

- Assumptions
- Business Assets
- Expenses
- Income
- Insurance
- Investments
- Liabilities
- Note Receivable
- Objectives
- Properties



WHEN

TIMING

Enter the occurrence of a certain time or event.

- Buy/Sell Transactions
- Savings & Transfers
- Wills & Gifting

eMoney Data Entry

eMoney's Data Entry provides expert setup and maintenance of your clients on the eMoney system. Our highly skilled specialists enter your client data in a secure, paperless work environment so you can focus on what you do best – connecting with clients and building your business.

TAKE YOUR SERVICE TO THE NEXT LEVEL

Here's how the process works

- The advisor collects the client's data using a fact finder and obtains the client's documents for uploading into the Vault.
- The advisor forwards a hard copy of the fact finder and Vault documents to eMoney Data Entry.
- eMoney Data Entry securely transfers the hard copy of the fact finder into the system and performs extensive quality review.
- The client's important documents are automatically converted into a pdf file and uploaded into their Vault.
- eMoney Data Entry informs the advisor when the data is in the system. A conference call is scheduled to review for accuracy.
- The advisor provides the client with access to their completed Personal Client Website.

ADVISOR SUCCESS STORIES

Situation

An advisor with over 120 clients wanted to add 10 – 15 clients a month to the eMoney system during his first year using eMoney. The advisor planned on hiring a dedicated staff member to learn the system and handle all the data entry. The advisor anticipated paying the new hire a salary of \$32,940.

The advisor learned about Data Entry Services and estimated the cost of adding all his clients to be no more than \$18,000.

Data Entry Services worked closely with the advisor to get all his clients added to the system two months ahead of schedule.

Impact to Advisor

- First year savings of \$14,940
- Annual savings of \$32,940
- Advisor able to assess a \$500 annual client fee, resulting in \$60,000 of new recurring revenue
- Advisor feels he is better positioned to identify new opportunities and attract and retain clients

