

Lisa Martin, 42

“I do all things eMoney.”

ADVISOR PROFILE

- Administrator/Operations
- Firm offers Financial planning, investment, estate, wealth, tax and bill pay, and insurance.

FOCUS

- Administration and Operations focused - Helps advisory team by ensuring a standard level of service.
- Makes sure eMoney is running smoothly
- Manages workflows, ownership, analytics, CRM
- Sets up and maintains advisor connections
- Manages client accounts and acts as the SME for budgetary decisions
- Confirms Financial Plan information
- Create budget and resource reports.
- Runs ad hoc performance reports, customizes performance reports for Advisory client.
- Operations focused Admin maintains book of business and performance reports.

EXPERIENCE

- 15 years in Finance

GOALS

- Grow AUM
- Grow client base





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OFFICE RELATIONSHIPS



Typically works in a main RIA office with 100+ employees or small office with 4+ employees

DAILY INTERACTIONS

- Varies, 10-15 advisors per day via email confirming data is correct in system
- 2-3 customer per day confirming information

TECHNOLOGY

Redtail	Salentica CRM
Portfolio Center	Black Diamond
Schwab	Datafaction for bill pay
Outlook	CRM
Google Drive	eMoney (Reports, Factfinder, Admin, Settings)
Advent	

TYPICAL WORKDAY

- Looking at where we are currently as a firm, how we are structured, and helping to move forward while making sure we have resources in place for advisors. Also, making sure we are collaborating with other departments.
- Early in, email, enter info, passes out work, reviews entries from previous day, rolls their accounts from new 100 clients and renaming to their naming conventions, going back to advisor to help the transition. Works through connection issues, improves workflow.
- Start with calendar, portfolio balances, uses Redtail as CRM, has a checklist, identifies holes, meeting prep, meetings and follow up.
- Has technical expertise in financial planning and occasionally works directly with clients

SERVICES

- Sets up and maintains advisor connections
- Manages advisor and new company training.
- Works with advisors to develop processes and procedures to deliver standard services to clients.
- Share eMoney with clients so they have access
- Works on Financial Planning team to enter info into eMoney, add new accounts, maintain accounts, handles advisor connections, prospects.
- First point of contact for client, firm initiatives, operations, billing.
- Supports Relationship Managers, pulls ad hoc reports, meetings, cashiering as needed.
- More focused on administration and operations. Role is to make sure eMoney is running smoothly by managing workflows, changing ownership, analytics, CRM, updating financial plans and making sure info is correct for planning.



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WHAT I LIKE ABOUT EMONEY

- New cashflow screen in plans, got new insights
- I like the direction eMoney is going, was cumbersome and is getting more user friendly.
- The Admin license has really helped me a lot. I am able to do unclassified assets across the office and makes it easier to run from an operational point-of-view.

INSIGHTS & OBSERVATIONS

- The term “operations” is preferred over the term “admin” due to vagueness and lower level admin assistant connotation.
- Role varies depending on size of firm but is the eMoney expert and resource for training and support.
- High technical ability

PAIN POINTS

- eMoney needs to inform users about updates, no matter how small.
- There is a lot of redundant typing.
- eMoney doesn’t play nice with anyone else. I need eMoney to talk with other programs.
- eMoney is not easy to work with.
- Client Management
- Staying on top of everything, juggling everything, client to client, time management, work flow management.
- New team and training ground for future planners, so never-ending cycle of training, real life estate planning, teaching how to use system, teaching their role, staying on top of changes and keeping people aware.
- Connections is always a challenge.
- I struggle to get good data out of a system I cannot manipulate.
- The more clients, the more difficult to maintain.

WHAT I REALLY WANT FROM EMONEY

- Calculator or tracker within liability section
- Pension calculator
- Debt snowball feature
- Tie the Social Security calculator with the timing of working and retirement
- More Redtail integration around kids
- Improve the speed of the system.
- Improve Connections
- Clients cannot look at their data.
- CRM Integration with eMoney, to avoid redundant typing
- Salesforce Integration
- More internal benchmarking
- “We need solutions with partners that are willing to work together and willing to integrate.”