

Unlimited Possibility

How Vizionary Wealth Saves \$450,000 Per Year with WealthPlan Group

The WealthPlan Difference for Vizionary Wealth



FLEXIBILITY



CUSTOMIZATION



CHOICE

Setting the Scene

Wayne Wagner's career in financial services started like many—at an insurance broker-dealer. After four years of that, he became disillusioned with the focus on selling products and went independent, joining LPL in 2000.

As he developed a full-service, planning-centric firm for those in the biotech and pharmaceutical industries, Wayne grew his business by leaps and bounds. Today, Vizionary Wealth serves clients in twenty states and half a dozen countries.

The work he does for clients goes far beyond investments and financial planning, too. He frequently gets involved in contract negotiations, compensation packages, and assisting clients when they move from one company to another.

Life Before WealthPlan Group

As Wayne's business grew at LPL, however, his problems began to grow as well. The Vizionary team had about 300 managed accounts, but the technology to rebalance them all effectively—and quickly—wasn't available.

Wayne recognized that he needed a change, but as someone who made investment decisions for clients, he didn't want to move to a managed accounts platform that would offer limited customization and take away his control.

For fifteen months, Wayne interviewed an exhaustive list of more than 80 firms—many of whom made lucrative offers to entice him to join.

In the end, he said no to them and chose WealthPlan Group.



Wayne Wagner Jr., ChFC, President

About Vizionary Wealth

Assets Under Management: \$300 million

Households: 155

Custodians: TD Ameritrade, Charles Schwab

Tech Stack: Riskalyze, Salesforce, Orion Advisor Tech

Life with WealthPlan Group

Wayne chose WealthPlan Group specifically because of the TAMP's flexibility and choice it gave him in making decisions about his clients' portfolios—while taking the administrative tasks off his team's plate.

Wayne also got to have a voice that no other company would offer. As with every advisor on the WealthPlan platform, he was given the opportunity to join the investment committee and dialogue with the firm's decision makers.

“WealthPlan Group has the most flexible and most innovative platform I’ve seen in the entire industry.”

“ Wayne Wagner Jr., ChFC, President
Vizionary Wealth Management

“It was attractive to me that WealthPlan thought highly enough of the advisors on their platform that they give us a direct line and a voice to share our perspectives,” Wayne said.

The flexibility of the WealthPlan platform gives Wayne and his team the ability to work with the complex financial situations brought to him by clients. If a portfolio has long term incentives or inherited shares, it's simple for Wayne and his team to exclude those assets from trading, billing, or manage them in any other way necessary.

A Nearly Half Million Dollar Improvement

In joining WealthPlan, one of Wayne's primary goals was to improve the Vizionary trading process. He's done that—not only saving himself hours each year, but almost half a million dollars in productivity too.

“We had been running 300 accounts on spreadsheets. When it was time to rebalance, we would manually look at each account, place trades, and rebalance to the correct or updated allocations,” Wayne said. “That process is now easily streamlined and automated with WealthPlan Group.”





Wayne estimates that between himself and another team member, they save 1,800 hours of productivity a year.

And those nearly 2,000 hours of work that they've now transferred to WealthPlan signify an efficiency gain of \$450,000 every single year.

“My decision to join WealthPlan Group has given me the ability to think differently about the rest of my life,” Wayne said. “I've written a book about financial planning for pharmaceutical executives and I've been able to grow my business exponentially over the past few years. None of that would be possible without WealthPlan Group.”

Partner with an RIA who puts you first.

Here are some of the key ways WealthPlan Group gives your firm the capacity to grow faster and serve your clients better.

-  An integrated, best-in-class tech stack that you can implement immediately
-  Compliance oversight that adheres to the highest standards and frees you to focus on client service
-  Flexible, customizable models to enhance your investment strategy offerings
-  Personalize the services you add from WealthPlan so you can create a truly differentiated and unique client experience

See how your firm can gain back hours of productivity and reduce your operating costs.

Contact WealthPlan Group today for your own personal consultation.

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