wealth.com +

CASE STUDY

How 9I Capital Group Uses Wealth.com to

Make Estate Planning More Accessible

THE CHALLENGE

Overcoming Estate Planning Misconceptions

For years, Kevin Thompson has helped retirees navigate the complexities of financial planning. However, a common misconception among his clients was that estate planning was only for the ultra-wealthy or prohibitively expensive. Many retirees overlooked critical documents—such as medical directives, durable powers of attorney, and living wills—that could significantly impact their futures.

Estate planning at his prior firms was often cumbersome and inefficient, requiring extensive coordination with attorneys or, in some cases, being deprioritized altogether due to its complexity. Kevin knew there had to be a better way.

ADVISOR

Kevin Thompson
President
9I Capital Group LLC

INDUSTRY EXPERIENCE

14 Years

CLIENT BASE

Primarily retirees

THE SOLUTION

Wealth.com's Accessible and Scalable Estate Planning Platform

Kevin first discovered Wealth.com through word-of-mouth and was intrigued by its disruptive approach to estate planning. Unlike traditional estate planning solutions, Wealth.com provided:

- **A modern, digital-first approach** to estate planning.
- **A collaborative experience** with advisors actively shaping the platform's growth.
- **A scalable way** to provide essential estate planning services to all clients, not just those with HNW portfolios.

"I wanted to be part of an industry disruptor," Kevin shared. "Wealth.com is moving fast, challenging the status quo, and helping advisors innovate within their practices."

Implementation & Experience

Integrating Wealth.com into 9i Capital Group's workflow was straightforward, as clients could complete the estate planning process at their own pace. Kevin notes, "The greatest value is the accessibility it offers—providing clients with estate planning support without the high costs typically associated with traditional partnerships."

W

Key Benefits for Advisors & Clients

Wealth.com seamlessly integrates into an advisor's workflow, ensuring that estate planning is no longer an afterthought but a fundamental part of comprehensive financial planning. By eliminating the barriers of cost and complexity, it empowers advisors to provide holistic, future-focused guidance to clients.

Affordable & Accessible
Clients can establish critical estate planning documents without high attorney fees.

Seamless Digital Experience
Clients can navigate the platform on their own timeline.

Advisors Stay in Control
Estate planning becomes an advisory-driven process, keeping advisors at the center of client conversations.

THE IMPACT

Making Estate Planning an Essential Part of Financial Planning

Integrating Wealth.com into 9i Capital Group's workflow was straightforward, as clients could complete the estate planning process at their own pace.

Kevin notes, "The greatest value is the accessibility it offers—providing clients with estate planning support without the high costs typically associated with traditional partnerships."

LOOKING AHEAD

Estate Planning as a Must-Have for RIAs

Kevin believes Wealth.com is the future of estate planning for RIAs, aligning perfectly with the broader shift toward integrated and accessible financial services.

Estate planning is no longer a luxury reserved for the ultra-wealthy—it's a critical component of holistic financial planning. With Wealth.com, advisors can seamlessly integrate estate planning into their practice, delivering greater value to clients while staying ahead in an evolving industry.

Kevin's advice to other advisors: "Incorporate a fee structure within your engagement model. Wealth.com is a tool that can transform estate planning within your firm."

Want to see how Wealth.com can elevate your practice? GET A DEMO

A special thanks to Kevin Thompson for his dedication to reimagining estate planning for his clients. His commitment to client-centric solutions is helping retirees secure their legacies with greater ease and confidence.

W