

Archer Investment Management Increased Estate Planning Document Creation & Creates Quick Wins for Clients

Archer Investment Management was founded in 2008 with a holistic approach to financial planning believing advisors should provide their clients help and guidance with all aspects of their finances, including estate planning. They have \$270 million assets under management (AUM), working with over 200 households, mostly mid-career, high-income earners in tech with new or young families.

THE CHALLENGE

They needed a better digital solution to increase estate planning completion.

Although the RIA had been founded in Austin, TX, they have since gone digital-first and work with clients across the country. While they had developed relationships with local, Austin-based estate attorneys, doing so in every state they had clients wasn't scalable. But the digital estate planning solution they had originally brought on wasn't working.

"Documents weren't getting done," Emily Rassam, Partner and Senior Financial Planner at Archer, said. "It's almost worse if somebody went through the entire process of creating documents and they were unsigned. So we would have a lot of unsigned documents sitting in our portal."

Wealth.com integrated easily into their holistic approach.

"The big difference with wealth.com is for us to be able to be more involved with the invitation process and that we also developed some workflows, processes and checklists around nudging our clients through the process of creating their documents," Rassam said.

They were impressed with more than just wealth.com's platform, it was also the people behind the software. "Our onboarding experience felt very white glove," Rassam said. "They showed me how to create my own

ADVISOR



Emily Casey Rassam
Partner & Senior Financial Planner,
Archer Investment Management

INDUSTRY EXPERIENCE

7+ Years

CLIENT BASE

Mid-career, high-income earners in tech with new or young families

documents, so I can see what the client experience is like.”

“The other thing is wealth.com’s FAQs are really good,” she added. “Between Anne’s [Anne Rhodes, Chief Legal Officer at wealth.com] videos and then everything inside the platform as you moved through each screen, I feel like I didn’t need as much help.”

THE SOLUTION

Wealth.com has become a relationship builder and is a big accomplishment for clients.

“We helped exactly 35 clients start their estate planning documents with wealth.com in the 35 weeks we’ve been offering the service,” Rassam shared. “That’s 35 families who likely wouldn’t have created documents otherwise because finding an attorney and paying thousands of dollars is stressful.”

Her favorite quote from a client so far is: “What we just did together in 20 minutes, took me 20 years to sit down and do”. Besides securing their clients’ legacies and making it easy to achieve something they know is important, it’s added a lot of value to the RIA and the service they can provide to clients.

“When you think about the cost of wealth.com and the cost of us actually having to do the work versus getting this crossed off somebody’s list, it’s a huge relationship builder,” she said. “It gives our clients a lot of peace of mind. And this is exactly what we can help them do. It’s something we can very easily point to and say, ‘we accomplished this big thing.’”

“It’s a nice lever to mark down as being accomplished,” she added. “I’m not giving them legal advice in any way but we’re getting it done.”

“I love this complimentary value-add we get to provide our clients and their families,” she added.

A special thanks to Emily Rassam for sharing her insights on how Wealth.com has helped Archer Investment Management integrate estate planning into their financial services and create more value for clients.

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Wealth.com empowers advisors to simplify estate planning with clarity and control—delivering a streamlined, client-friendly experience for both first generation millionaires and UHNW families.

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