

wealth.com

How PATH Financial Partners Added \$20M in AUM and 30+ Estate Plans in 6 Months with Wealth.com

Advisor



Jason Oestreicher, CFP®
Financial Advisor

Industry Experience

19 years

Firm

PATH Financial Partners,
affiliated with Osaic

Client Base

Public sector and blue-collar workers, including teachers, higher education employees, first responders, hospital staff, and municipal employees, who typically have ~\$1M or less in total assets.

“You can’t provide any other type of value that is as impactful as estate planning. Clients aren’t going to leave you when you offer it. And Wealth.com pays for itself. Just uncovering \$1 million in new AUM more than covers the software for the entire year, and we have found \$20 million so far,” said Jason Oestreicher, CFP® and the PATH team.

The Challenge: Bringing Estate Planning to an Underserved Market

For nearly two decades, the PATH team has been committed to helping blue-collar and public-sector workers protect their hard-earned savings. The team at PATH Financial Partners including financial advisors Jason Oestreicher, CFP®, Nick Brown, Travis Rich, and operations manager Daniel Erazo, serve teachers, higher education employees, first responders, nurses, and municipal employees who dedicate their careers to serving others. Yet, when it comes to estate planning, these public servants are often left behind.

“These families might have around a million dollars total between retirement accounts, home equity, and savings,” Jason said. “For many of them, this is the first time they’ve accumulated that kind of wealth, and their biggest priority is making sure it goes to their kids.”

The traditional process for creating even a basic estate plan was anything but accessible. Local attorneys were charging \$3,000 to \$5,000 for standard documents, often created from a template, and the cost was driving clients away.

“Teachers making \$50k to \$60k a year shouldn’t have to choose between getting a will and replacing their air conditioner,” Jason said. “That’s not right. But for years, that was the reality.”

The team at PATH Financial Partners also saw another issue: by referring clients to outside attorneys, they were losing control of the process and often losing the opportunity to build long-term relationships with the next generation. “If you’re not part of the estate planning conversation, you’re missing the most impactful way to retain clients,” Jason explained. “And you’re missing the easiest ‘path’ to building trust with their kids.”

The Solution: A Non-Negotiable Tool for His Practice

When the team transitioned from a legacy firm to PATH Financial Partners, affiliated with Osaic, Wealth.com wasn’t just on their wish list, it was a dealbreaker.

“We told every firm we interviewed with: if you can’t get us approved for Wealth.com, we’re not coming over,” Jason said. “That’s how strongly we believe in it.”

From day one, PATH Financial Partners integrated Wealth.com into every client interaction. Estate planning became a required step for anyone working with the firm, not an optional add-on.

“When you do estate planning with clients, they’re not leaving you,” Jason explained. “We all charge around 1% to 1.5%. The difference is, our 1% includes a will, trust, medical directive, and power of attorney. That’s what sets us apart.”

Wealth.com’s features gave Jason and the team at PATH the control and clarity they were looking for:

- **The Vault:** The Vault is an organized framework for storing important documents and keeping a comprehensive library in one place. Files can be uploaded by the advisor, specified colleagues, or clients for trusted collaboration.
- **Report Builder:** With Wealth.com, advisors can transform complex estate plans into clear, professional-grade reports their clients will actually understand and act on. Wealth.com’s visualizations simplify complex structures so clients can see exactly what will happen to their assets.
- **Ester®:** Ester is Wealth.com’s proprietary AI software that empowers advisors to turn complex estate documents into clear, actionable insights for every client, at every level. Ester can visualize and summarize estate plans instantly.
- **Advisor Support:** Jason shared his experience with Wealth.com’s support team: “Becky answers my emails within two hours every time. I’m her number one fan. Marketing even customized my materials to match my firm’s branding. That kind of support is rare.”

The platform's clean, intuitive design also resonated with PATH's clients. "These are people who aren't always comfortable with technology, but Wealth.com just makes sense to them," Jason and the team said. "That's huge."

The Results: \$20M in AUM, 30+ Estate Plans, and Explosive Referral Growth

In just six months, PATH Financial Partners' integration of Wealth.com has delivered measurable results:

- **30+** completed estate plans with another 15 in progress
- **\$20M** in uncovered AUM/AUA directly tied to estate planning conversations
- **50%** of invited clients start their estate plan
- **10** new prospects from a single estate planning presentation

One workshop alone created a snowball effect: after speaking to a group of school administrators, one attendee, a principal, invited Jason to present to their entire staff. "That's 100 people in one school," Jason noted. "Multiply that by 10 schools, and suddenly you're looking at 1,000 potential new leads."

The retention benefits are just as powerful. "We're in the middle of a \$124 trillion generational wealth transfer," Jason said. "If you're the one who set up the estate plan and have the documents in your Wealth.com Vault, you're the advisor their kids will call when the time comes. That's how you keep assets in your book for generations."

PATH's approach is also driving organic referrals: "With Wealth.com, the referrals generate themselves," Jason said. "Clients see the value, and they want their friends and family to have it too."

Looking Ahead: Making Estate Planning a Must-Have

Jason, Travis, and Nick believe estate planning will become a standard expectation for clients, and advisors who don't offer it risk falling behind.

"Most people don't have Rockefeller-level money or estate plan complexity," Jason said. "They don't have a farm with cattle and four marriages to navigate. They just need the core four estate planning documents, and Wealth.com makes it simple and affordable."

For the PATH team, the decision is clear: "You only need to uncover \$1M in new AUM to more than pay for Wealth.com for the whole year. This is such an easy target to hit; we've uncovered \$20M so far with Wealth.com."

Their advice to other advisors is equally direct: “If you’re not having the estate planning conversation, you’re missing the most impactful value you can provide. This isn’t just another service, it’s how you set yourself apart, retain clients, and secure the next generation.”

A special thanks to Jason Oestreicher and the PATH Financial Partners team for sharing how Wealth.com has transformed their practice, driven measurable ROI, and strengthened client relationships across generations.

wealth.com

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

Schedule a demo today at wealth.com/demo