CASE STUDY

wealth.com

How Prime Capital Unlocked 10X ROI

on Estate Planning with Wealth.com

ADVISOR

Will O'Rourke
Private Wealth Manager & Estate Planning Attorney
Prime Capital Financial

INDUSTRY EXPERIENCE
10+ Years

CLIENT BASE
Business Owners or Key Executives

THE CHALLENGE

Managing Complex Estate Structures and Tax Strategies for Business Owners and Executives

Prime Capital Financial has been helping business owners, key executives, and high-net-worth individuals navigate complex financial and estate planning challenges for over 30 years. The firm is known for offering tailored solutions for succession planning, retirement, and legacy preservation. Will O'Rourke, Private Wealth Manager and Estate Planning Attorney at Prime Capital Financial, faced a problem: he was forced to rely on outside attorneys to handle estate planning, which made the process less efficient for both him and his clients. As Will put it, "Before, I had to source outside legal services for clients instead of having a solution I could provide." This meant that clients were often juggling multiple service providers, leading to inefficiencies and a lack of control over the overall process.

Will knew he needed a solution that would allow him to provide comprehensive service within his own practice, without the constant need for third-party attorneys.

"Wealth.com offers a solution that fills a significant gap in the estate planning industry and helps us provide value that others can't."

W

THE SOLUTION

Wealth.com Makes Estate Planning Easy & Accessible

Will knew the importance of offering estate planning services directly within his practice, but he needed a digital solution to streamline the process and make it easier for both him and his clients. After researching several options, he chose Wealth.com. He specifically noted the value of Ester™ AI document extraction as well as the visualizations and reporting features as key reasons why. These features stood out because they helped Will better understand and illustrate clients' estate structures, potential distributions, and costs, making the entire planning process clearer for both him and his clients.

"I needed a solution that would let me use my attorney license to fill a large gap in the industry," Will shared. Wealth.com provided a way for him to do that, giving him control over the entire process and allowing him to guide clients through estate planning efficiently, all within his own practice.

Will also appreciated the ease of use and the revenue potential, knowing that Wealth.com would make it easier to add value in ways that other firms couldn't.

RESULTS

New Revenue Streams, Better Engagement, and Stronger Client Relationships

Since adopting Wealth.com, Will has seen measurable business growth. Clients are more engaged, asking deeper questions and participating actively in the estate planning process. This has led to clearer outcomes, better alignment on planning goals, and increased client satisfaction.

As Will shared, "clients have found the platform easy to use and often take a more active role than we expected." The result has been better decision-making and a more streamlined process for everyone involved.

ROI Positive in Under 60 Days

Prime Capital saw full ROI on Wealth.com in less than two months—turning estate planning into a new business opportunity.

Will also shared a specific example: "Clients were unclear about the appointments they made in prior estate planning documents and the consequences. They didn't realize they had appointed relatives as Power of Attorney who have since become incapacitated themselves." Wealth.com helped clarify these issues, making it easier for clients to spot potential gaps in their existing plans.

As a direct result of integrating Wealth.com into his practice, Will expects to see an additional $5-10K in monthly revenue from the enhanced services he is now able to offer. "Wealth.com not only helps streamline the estate planning process but also opens up new avenues for revenue growth," Will explained. The combination of increased client engagement, efficiency gains, and revenue growth has made Wealth.com a game-changer for his practice.

How Will Sees Wealth.com Fitting into the Future of Estate Planning

Looking ahead, Will sees Wealth.com as a key tool in democratizing estate planning for advisors. He believes that the platform shows that estate planning does not have to be complex or require large attorney fees unless necessary.

"Estate planning doesn't have to be overly complicated or expensive if the situation doesn't call for it. Wealth.com allows advisors to become competent in estate planning and speak to it confidently, which is a huge value to clients."

A special thanks to Will O'Rourke for sharing his insights on how Wealth.com has helped Prime Capital Financial integrate estate planning into their financial services and create more value for clients.