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# How CLC Investment Advisors Added \$30K in New Revenue and Won a \$1M Client within 4 Months

## Advisor



**David Cadarette**  
Financial Advisor

## Industry Experience

9 years as an advisor,  
20+ years in finance

## Firm

CLC Investment Advisors

## Client Base

Mass affluent households,  
typically couples in their 60s to  
80s with \$250,000 to \$3.5 million  
in assets

“Within the first week, Wealth.com paid for itself. Since onboarding, we’ve generated over \$30,000 in new revenue and even converted a \$1 million prospect who chose us because we offer estate planning.”

## The Challenge: Referring Out and Losing Opportunities

Before Wealth.com, David Cadarette would refer clients to outside attorneys for estate planning, a process that was both cumbersome and created unnecessary complexity for his clients, many of whom faced analysis paralysis when it came to estate planning decisions. Despite his passion for estate planning education, referring clients elsewhere meant losing control of an essential part of the financial planning process.

“I can’t even count how many clients I’ve sent to local attorneys in my network for estate planning documents through the years,” David recalled. “This meant my clients had to schedule another meeting, drive across town, and juggle another relationship.”

The breaking point came when a promising prospect, whittled down from five competing advisors to just two, ultimately chose another advisor who offered estate planning in-house. “He told me, ‘I really like you, but this other guy does estate planning,’” David said. “That moment hit me hard. I knew I was missing something critical in my practice.”

## The Solution: Bringing Estate Planning In-House with Wealth.com

Shortly after that experience, David attended a conference where his broker-dealer announced the rollout of Wealth.com.

“As soon as they introduced it, I walked to the front of the room and said, ‘Sign me up.’ I knew this would change my business,” he said.

Wealth.com allowed David to integrate estate planning directly into his client workflow. The onboarding was fast and intuitive, and his clients immediately saw the value. “The conversation is simple,” he explained. “‘Do you have your will and trust done?’ If they say no, I tell them we can collaborate and have Wealth.com create these documents right here in the office.”

David built a two-step client process: the first meeting walks through creating documents inside Wealth.com; the second is a formal signing appointment with printed, tabbed binders and notarization in-house. Each client leaves with both a physical binder and access to their digital vault.

He also introduced a pricing model with two tiers, one for clients and another for non-clients. The structure creates a powerful incentive for prospects to become ongoing advisory clients. “We had someone today who said, ‘I’ll take the one that’s \$2,200 less,’ and became a client on the spot,” he said.

## The Results: \$30K in New Revenue and a \$1 M Client Win

“Within the first week, Wealth.com paid for itself,” David said. “Since onboarding, we’ve generated over \$30,000 in new revenue and even converted a \$1 million prospect who chose us because we offer estate planning.”

That single conversion came directly from a simple email to 300 seminar attendees announcing his new estate planning service. One recipient responded, scheduled an appointment, and ultimately brought \$700,000 in managed assets and \$300,000–\$400,000 in annuities.

“For our firm, that was huge,” David said. “And it started with a three-line email that just said, ‘We can help you with estate planning.’ Wealth.com opened the door to conversations I couldn’t have before.”

David’s firm has added \$25,000 to \$30,000 in new revenue from Wealth.com within the first four months and continues to grow through regular estate planning seminars, where he introduces the concept of “simplified estate planning” as a cornerstone of comprehensive financial advice.

## Client Impact: Emotional Wins that Build Loyalty

“I’ve had clients in tears after completing their estate plan,” David said. “For many, it’s something they’ve been putting off for decades. Wealth.com makes it easy, and it’s transforming how we serve our clients.”

One client, an 82-year-old man named David, had been procrastinating his estate plan for nearly 50 years. “We completed his documents, and when the progress bar turned green across the screen, he stood up in tears and started high-fiving me,” David recalled. “It was incredibly powerful to witness.”

Stories like that inspired David to design a creative client recognition idea. Each time a client completes their estate plan, he sends a framed “Estate Planning Achievement” certificate as a reminder of the milestone and a conversation starter with their peers.

“It’s an accomplishment worth celebrating,” he said.

## The Future: Making Estate Planning a Core Growth Strategy

David believes Wealth.com has redefined how his firm delivers holistic advice. “Adding estate planning makes us a more well-rounded firm,” he said. “The opportunity is massive. Only a fraction of Americans have complete estate documents. Offering this service helps us reach a much broader audience.”

He also sees it as a differentiator in an industry where most advisors offer similar pricing and investment services. “We all charge roughly 1%. What sets you apart? For us, it’s that we can say, ‘We’ll help facilitate the creation of your will, trust, and healthcare directives right here in our office.’ Clients see that and immediately understand the value.”

When asked what he would tell other advisors considering Wealth.com, David didn’t hesitate: “It’s not another shiny object. It’s a genuine business growth opportunity. And the best part is, it helps clients accomplish something deeply meaningful.”

A special thanks to David Cadarette for sharing how Wealth.com helped CLC Investment Advisors bring estate planning in-house, drive measurable growth, and deliver greater value to clients.

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

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