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How Fiat Wealth Generated 579 Prospects and \$39M+ in New Assets

with Estate Planning Workshops Powered by Wealth.com

THE CHALLENGE

Overcoming Disjointed Estate Planning and Client Confusion

Brad Gotto, CEO of Fiat Wealth Management, works with a unique group of hardworking, first-generation wealth clients who have accumulated between \$1 million and \$10 million in assets. Many of these clients did not fully understand their existing estate plans, often relying on outdated legal documents. Brad found the process disjointed, especially when external attorneys were involved.

“We’d get clients coming in with 15-year-old estate documents, and while the legal language was there, they didn’t really understand what those documents meant for their future,” said Brad. “Estate planning shouldn’t be so fragmented. We knew we needed a solution that gave us more control—something that worked alongside the other financial services we provide.”

The challenge was clear: Fiat Wealth needed an estate planning solution that would simplify the process, make it more accessible to clients, and allow the firm to take charge of the entire process without the need for third-party attorneys every time.

ADVISOR



Brad Gotto

CEO

Fiat Wealth Management

INDUSTRY EXPERIENCE

19 Years

CLIENT BASE

Primarily first-generation wealth, blue-collar retirees with assets between \$1 million and \$10 million, referred to as “accidental millionaires.”

“Wealth.com has completely changed how we approach estate planning. It gives us the tools to create clear, actionable plans for our clients, all within a seamless experience.”

THE SOLUTION

Wealth.com Brings Simplicity and Clarity

After exploring multiple options, Brad and his team found Wealth.com to be the right fit. Wealth.com's features like Ester®, an AI-powered document extraction tool, stood out immediately. Ester summarizes complex estate planning documents, like trusts, to act as a co-pilot for advisors to easily identify and confirm key information. This, combined with the platform's visualizations and reporting tools, helped Brad gain clarity around clients' estate structures, potential distributions, and associated costs.

“Wealth.com was a game-changer for us,” Brad explained. “It allowed us to offer estate planning directly within our firm, with a level of control we never had before. It didn't just make the process easier for us, it made it easier for our clients. They were able to get the clarity they needed, and we were able to walk them through the entire process.”

Brad added, “I'm a big Apple guy, and the platform's ease of use reminded me of that. It's intuitive, clean, and just makes sense to use. For clients who aren't as tech-savvy, that's crucial.” This comparison highlights how Wealth.com's simplicity and design made it accessible, even for clients less familiar with digital tools.

Plus, Brad was also looking towards the future when choosing the right solution. “I wanted a platform that grew the way we did,” he said. “One that would continue to evolve and invest in technology. Every platform we looked at seemed to be scratching the surface, but Wealth.com was fully developed and had a team that was committed to improvement.”

Wealth.com's scalable pricing model made it possible for Fiat Wealth to offer this service to a broader range of clients without significantly increasing costs, which was a key factor in Brad's decision.

RESULTS

Measurable ROI, Stronger Relationships, and Market Differentiation

“What Wealth.com has done is simplify a complex process, giving us a tool that makes understanding estate planning less daunting for both us and our clients,” Brad said.

Since adopting Wealth.com, Fiat has seen measurable improvements in client engagement and firm growth. Clients are more involved in the estate planning process, actively reviewing documents, asking better questions, and feeling empowered in their decision-making.

“Clients have been pleasantly surprised by how easy the platform is to use,” says Brad. “They're engaging more than we expected. And that leads to better, more informed decision-making on their part.”

One Standout Story

Fiat Wealth was one of three firms considered by a \$25 million ultra-high-net-worth family. Wealth.com played a pivotal role in getting Fiat to the final stages of the interview process.

“The family was blown away by what Wealth.com could do,” Brad said. “The platform helped us earn a seat at the table by showing we could deliver a tech-enabled, client-centric planning experience that rivaled much larger firms.”

Additionally, Wealth.com has driven powerful results through Fiat’s educational estate planning workshops. Between May 2023 and December 2024:

- **Workshops Hosted: 56**
- **First Appointments Booked: 579**
- **New Clients Gained: 35**
- **Average Case Size: \$1.12 million**
- **3-Year ROI: \$4.35**
- **5-Year ROI: \$6.57**

The ROI on Fiat Wealth’s estate planning workshops has increased significantly. Fiat Wealth offers three key types of educational workshops: tax planning, investment strategies, and estate planning. Of these, estate planning has seen the highest return. “We spend hundreds of thousands of dollars annually on marketing these workshops,” Brad shared. “Estate planning has shown the highest ROI, surpassing our other two topics. Wealth.com gave us the tools to offer this service confidently and helped us provide more value to the families we serve.”

Brad attributes the success of their estate planning workshops to Wealth.com’s ability to simplify and streamline the estate planning process. “Once I found Wealth.com, I felt confident moving forward. The platform gave me the ability to guide clients in a way I couldn’t before, and that’s helped us see growth in both client engagement and our practice.”

THE FUTURE

How Brad Sees Wealth.com Shaping the Future of Estate Planning

Looking to the future, Brad sees Wealth.com as an essential tool for the future of financial and estate planning. “Estate planning doesn’t need to be overly complicated or expensive. Wealth.com has proven that you don’t have to rely on expensive attorneys unless absolutely necessary. Advisors can confidently use the platform to guide clients through the process, giving them value right from day one.”

Brad added, “I see Wealth.com as key to helping advisors expand the value they provide. It’s not just about managing assets, it’s about helping clients protect their wealth and plan for the future, in a way that’s both simple and effective.”

“Wealth.com isn’t just about creating documents. It’s about long-term planning. With the platform, we can keep documents updated and ensure our clients’ plans stay relevant without the ongoing cost of working with attorneys. That’s a huge benefit for our clients.”

A special thanks to Brad Gotto for sharing his valuable insights on how Wealth.com has helped Fiat Wealth Management streamline estate planning and offer more value to their clients.

Want to See How Wealth.com Can Elevate Your Practice?

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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