



**Operational and Technology Efficient business
drives Growth**

Jeff Martin

Director of Operations and Service Advisor



- Based out of Chicago, IL
- Manage over \$350 Million in AUM
- Approx. 500 households
- 130 active households
- 70% Advisory
- Focus on Tax, Estate and Investment



Your

Wealth Management Team



Jeff Johnson
Founder, President &
Personal CFO



Jim Adducci
CPA, CFP, MBA



Jeff Martin
Director of Operations
& Service Advisor



Alisha Mccllearn
Operations Manager
& New Account
Administrator



Shannon Urbina
Client Relationship
Manager



Tiffany Hajandi
Tax & Estate Planning
Coordinator

THE NEXT 45 MINUTES

- ▶ **Current state of our oiled machine**
- ▶ **Future state of our well-oiled machine**
- ▶ **Significant Growth & Engagement**
- ▶ **Questions**

Current state



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- ▶ People Growth in 2025 - 1 shift from part time to full time & 2 full time
- ▶ Limited processes
- ▶ Ability to start to specialize in role
- ▶ Lots of overlap on tech

My thoughts

- ▶ Take inventory of current technology, it's primary purpose and ancillary options
- ▶ Understand the people in the firm
 - ▶ Likes / dislikes - Strengths / weaknesses
- ▶ Create a priority list

What's the most important
client facing piece of
technology for you?

**MOST
IMPORTANT**

Future State

- ▶ Roles clearly defined and aligned with personnel
- ▶ Confidence of team member taking time off
 - ▶ Things will get done & nothing will be missed
- ▶ Proactive touch points with clients
 - ▶ Not just annual meetings, Long Term Care, Medicare, Social Security...
- ▶ Seamless integration with tools and systems

My Thoughts

- ▶ There will always be obstacles, block the time and stick to it! Set a timer if necessary
- ▶ Focus on 1 thing at a time - too many projects can lead to stalling on all projects
- ▶ Create your own firm Big Fake Rule
 - ▶ Example: when our clients turn 60 we have a family meeting

What's the next piece of technology you are looking into?



Substantial Growth & Engagement

- ▶ Referral based only
- ▶ With proactive touch points outside of Annual Meeting already seen great numbers
- ▶ Dialed in processes and technology
 - ▶ Increased engagement from existing client
 - ▶ Smoother onboarding
 - ▶ Efficient communication with other CPA / Professional Alliances

THE WRAP UP

- ▶ Dial in processes aligned with roles and responsibilities
- ▶ Have a mechanism to automate
- ▶ Execute the results will come

Questions?



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