



Wheaton Wealth are a financial planning firm which offers a unique and personal service utilizing mind mapping interactively with clients. Transforming the method of financial planning, Wheaton Wealth delivers clarity and a greater degree of understanding to clients' financial life through the use of their one of a kind, *Insight Map*.

“Without this process, we wouldn't be in business today”

Robert K. O'Dell, Cofounder, Wheaton Wealth Partners

Financial planning can be a somewhat dry and laborious subject, with much time spent on information gathering in preparation to plan ahead. However, with the introduction of MindGenius, Wheaton Wealth were able to offer clients a more engaging and visual experience.

Using their own customized *Insight Map*, covering the main aspects of a client's financial life; Family Matters, Legacy Preservation, Planning and Investments, Wheaton Wealth walk through the map with each client. Providing transparency at all times, advisors will ask the client questions relating to each aspect, with another advisor scribing to ensure all information is covered and included within the map.

By Building the map right in front of the client, they are able to watch the map grow and observe their life and finances come together hand in hand. The visual presence presents the client with greater clarity and understanding. It is important for advisors to have a comprehensive understanding of the individual and their financial life in order to assist the client. By gathering the client's information in such a methodical manner, Wheaton Wealth are presented with the full picture to then extract the key information and prepare a strategic, well informed and thorough financial plan.

Utilizing MindGenius for such a dynamic process provides **Wheaton Wealth** with a visually engaging way to:

Identify goals, values and objectives

Capture, structure and document financial data

Improve the entire client engagement process

“We believe MindGenius is a major contributor to our client acquisition”

Robert K. O'Dell, Cofounder, Wheaton Wealth Partners

This unique method has attracted intrigue from other members of the financial planning community and offered Wheaton Wealth a substantial competitive edge.

