eMoney + Mayflower Advisors

CASE STUDY

Delivering Peace of Mind Through Complex Financial Planning with eMoney

THE CLIENT ›
THE GOAL ›
THE SOLUTION ›
THE RESULT ›

Office Locations

- Boston, MA
- Newton, MA
- Westborough, MA
- Danvers, MA
- Providence, RI
- Durham, NC

Areas of Specialty

- Estate planning
- End-of-life planning

David Manukjan, CFP®,
Director of Financial Planning

Larry Glazer, AAMS®,
Managing Partner

"We empower financial confidence for every life stage, fostering lifelong relationships through excellence, honesty, and integrity."

Impact at a Glance

Advisor Retention

98% over the past five years

Client Retention

50% increase over the past five years

Advisor Adoption

90% of new advisors use eMoney to manage their book of business

AUM/AUA

$6.1B as of January 2026,
5% average annual net increase

Financial Planning Engagement

10% annual increase in clients with a documented financial plan

Firm Profile

ESTABLISHED
2005

PRODUCT USED
eMoney Pro

NUMBER OF eMONEY CLIENTS
372

NUMBER OF ADVISORS
13

EMPLOYEES
30

HEADQUARTERS
Boston, MA

The Goal

Mayflower Advisors LLC is an award-winning independent Registered Investment Advisor (RIA) firm renowned for its personalized and innovative financial solutions. Established with a primary mission of empowering financial confidence for individuals, corporations, endowments, foundations, and non-profits, Mayflower Advisors has built a reputation grounded in delivering peace of mind for their clients.

As the firm has evolved over the last two decades, and its client base expanded, the leadership team realized the planning tools their advisors used lacked the sophistication needed to address challenges such as detailed cash flow analysis, nuanced taxation considerations, and advanced retirement projections. The firm tasked David Manukjan, CFP®, Director of Financial Planning, with identifying a solution to empower their advisors and expand their offerings for both existing clients and new high-net-worth individuals, enabling higher retention capabilities across the firm.

***Established with a primary mission of empowering financial confidence for** individuals, corporations, endowments, foundations, and non-profits.*

“With our advisors using eMoney for client meetings, we can show what’s happening in real time, whether that’s estate considerations, retirement modeling, or strategic financial moves. This flexibility really helps.”

— DAVID MANUKJAN, CFP®, DIRECTOR OF FINANCIAL PLANNING

The Solution

Fortunately, Manukjan had extensive experience with almost every planning platform on the market, and he preferred the value of a single platform with the advantages of eMoney. With Managing Partner Larry Glazer's support, Mayflower Advisors implemented eMoney at Manukjan’s recommendation, bringing enhanced clarity and precision to their financial plans.

> "With Monte Carlo simulations and detailed cash flow reporting, we can show clients precise breakdowns, customized assumptions, and specific strategies—everything from estate planning and cashflow analysis to long-term financial projections over their entire lifespan."
> - David Manukjan, CFP®, Director of Financial Planning

With eMoney, Mayflower Advisors expanded comprehensive service offerings to include:

- **Advanced scenario planning tools,** including Monte Carlo simulations, that show varied financial outcomes and tailor plans to client-specific scenarios
- **Cash flow projections** that allow granular analysis of income, expenses, investments, and liabilities over time
- **Integrated account aggregation** and reporting through Black Diamond, streamlining data for simpler tracking and better decision-making
- **Enhanced collaboration** between advisors and clients with an iterative planning process that allows plans to be refined during client meetings

Mayflower Advisors' use of eMoney has also helped foster their collaborative environment and personalize the financial planning experience. These strategies have strengthened client confidence in the firm’s ability to manage complex financial challenges while remaining adaptable to every client's specific needs.

“eMoney transforms our clients' complex and emotional financial decisions into transparent, data-driven conversations that keep them engaged and confident in the choices they make. That's peace of mind for the long term.”

— DAVID MANUKJAN, CFP®, DIRECTOR OF FINANCIAL PLANNING

The Result

eMoney has helped Mayflower Advisors achieve success by improving how they engage clients and operate internally, positioning the firm for future growth. Most of all, they have enhanced their clients' confidence and peace of mind, enabling deeper, longer-lasting relationships.

Maybe most importantly, eMoney has helped fortify one of Mayflower Advisors' primary areas of focus, client retention, by helping Mayflower work with clients who are in the later stages of their life and more focused on estate planning.

> "After switching from a proprietary, antiquated goals-based financial planning system to a modern cash flow-based system, our client attrition improved by 50%, especially as assets transition from aging clients to heirs who choose to continue working with our firm."
> - Larry Glazer, AAMS®, Managing Partner

Manukjan points to his advisors' response as further evidence of success, "90% of new advisors we've brought on since we adopted eMoney use it for their book of business."

The adoption of eMoney has expanded across Mayflower Advisors, with 372 active plans now in the system and 13 advisors leveraging the platform for advanced planning and reporting. All of this has helped the firm become one of the fastest-growing RIAs in the country by AUM growth over the past year.

By harnessing advanced financial planning tools, Mayflower Advisors has accelerated its shift toward delivering holistic, personalized planning services. This allows the firm to retain high-net-worth clients while successfully engaging new ones, strengthening their ability to thrive over the long term in an increasingly competitive industry.

Disclosure

All information has been obtained from sources believed to be reliable, but its accuracy is not guaranteed by Mayflower Advisors. There is no representation or warranty as to the current accuracy, reliability or completeness of, nor liability for, decisions based on such information and it should not be relied on as such.

Looking to Grow Your Business? See How eMoney Can Work for You

Call 1-888-362-4612 or visit **emoneyadvisor.com** to learn more.

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