FOR FINANCIAL ADVISORS & RIA PRACTICES

Keep the family. Keep the assets.

My Money Vision is an education-only financial literacy platform for your clients and their adult children. Advisors buy a seat, invite their client families, and stay connected to the next generation without adding compliance risk or work to the practice.

NEW HIRE TRAINING *the short game*

Give your aspiring advisor real client reps from day one.

Most trainees spend months studying before sitting across from a real person. MMV gives them a structured way to start meeting your existing clients' adult children and build relationships early.

Real reps, low risk
Your trainee runs the meetings with clients' kids. They get practice; you don't risk your top relationships.

Licensed or not
The platform is education and coaching, not advice. New hires can engage families before they've passed their exams.

Builds their book from your relationships
When those kids are ready for a Roth IRA or first brokerage account, your trainee is the person they already trust.

Your new hire runs education meetings with client families from week one, no license required.

CLIENT RETENTION *the long game*

Connect with your clients' children before someone else does.

Only about 1 in 5 heirs keeps their parents' advisor (Cerulli Associates). MMV fills the gap between knowing a client has kids and those kids being worth a meeting.

Stay in front of the next generation
Their kids get a financial literacy app branded to your practice. By the time they sit down with you, the education is done.

Fully compliant, zero advice
Every lesson and interaction is education only. No investment advice, no product recommendations, no compliance risk.

Low effort, high stickiness
Mention the platform, invite your families, and stay in the loop through your dashboard. The platform handles the teaching.

IN PRACTICE Founding firms are running this now. Use cases include:

- Estate and inheritance preparation
- Engaging top client families with large AUM share
- Monetizing smaller client families
- Account openings that turn into full financial plans
- Sharing branded advisor and firm materials
- General client education platform and app

See it in action.

We'll walk your practice through a branded seat, covering new hire training and client families both.

Run the math on your own book: mymoneyvision.com/advisors#calculator

Book a 20-minute walkthrough →