

THORNTON WEALTH MANAGEMENT

Wealth manager puts scheduling appointments on auto-pilot

“TimeDriver allows me to focus more of my time on what is important to my clients—helping them make smart decisions about their money. It has eliminated the time consuming back and forth emails and calls previously required to schedule a single client appointment and has become a key tool that I rely on to be more efficient.”

*Russ Thornton
Founder and President
Thornton Wealth Management*

“Catch as catch can” approach to scheduling stalled financial advisor

As someone who focuses on people’s wealth and financial well-being, Russ Thornton knows that any time spent doing administrative work takes away from time with his clients and helping to generate revenue. “I schedule approximately 3-5 appointments per week with my clients to introduce them to my services or review their

portfolios. For each appointment, it took 3-4 correspondences back and forth before we were able to nail down a time that worked for both of us,” comments Thornton, founder and president, Thornton Wealth Management. “This was costing me 10-15 minutes to schedule each appointment, a complete waste of time for both me and my clients.”

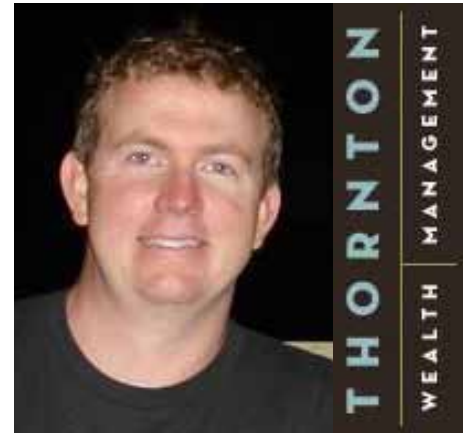
TimeDriver proves to be both a time saver and a headache cure

Through a web search, Thornton discovered TimeDriver, a personal appointment scheduling solution that syncs with his Google calendar. “As a financial advisor, I have had plenty of headaches to deal with recently. Having to play phone and email tag back and forth with clients just added to the frustration. Now, with TimeDriver, I simply embed a ‘Schedule Now’ link in my emails to clients and they can automatically access my Google calendar and choose a time that works for both of us,” observes Thornton. “Appointments seamlessly flow into my calendar. I have been able to gain back about 5 hours per month, or more than a full week’s worth of work over the course of the year. It is a better cure for headaches than extra-strength Excedrin.”

net worth individuals and generally very computer literate. “Initially I was concerned that my clients wouldn’t easily grasp the personal scheduler concept or embrace the hands-off approach, but feedback has been the exact opposite,” continues Thornton. “They easily understand how to use the technology and embrace it as a time savings for themselves. Often they hold onto my TimeDriver link so that at any time they can access my calendar and schedule an appointment with me.

“I highly recommend TimeDriver to any professional advisor; it has appeal whether you’re a one-person firm or a large company with administrative staff. The time saved not having to play phone tag or send emails back and forth to schedule meetings is like a breath of fresh air,” concludes Thornton.

Thornton’s clients are typically in their mid-50’s, mostly upper-middle class to high



About Thornton Wealth Management

Based in Atlanta, Georgia, Thornton Wealth Management (TWM) serves a select group of individuals and families, most of which are local. TWM takes a comprehensive approach to wealth management and helps people make smart decisions about their money—providing them with greater simplicity, independence, peace of mind, and security for the long term. Thornton is passionate about helping clients realize their most important goals and objectives.

- Who?** Russ Thornton
Founder and President
Thornton Wealth Management
- How?** Sends email invitations embedded with a “Schedule Now” link to clients
- Usage?** ~200 appointments/year
- Calendar?** Syncs with Google
- Benefits?** Regained more than a full week’s worth of time
Eliminated 3-4 correspondences back and forth to schedule each appointment
Easily understood and embraced by clients



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