Savology

# The Advisor's Guide to Savology

Six ways to run the financial report card across your practice — from prospecting to first meetings to annual reviews — plus matched introductions when you want more of them.

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July 31, 2026

## Why I built this for advisors

Advisors don't have a value problem — they have a starting-line problem. The value you deliver shows up after someone sits down, opens up, and shares their financial life. Everything before that moment is friction: prospecting conversations with people who aren't ready, fact-finding meetings that burn your first hour together, and clients who can't see the progress you've made for them.

Savology attacks the starting line. Our platform grades a household's entire financial life — retirement, emergency savings, insurance, debt, estate planning — in as little as three minutes, then hands them a personalized plan to raise those grades. For the household, it's a lightbulb. For you, it's the fastest route from stranger to consultative conversation that I know of. This guide walks through the six ways advisors put it to work.

## First, what your clients experience

A short survey — no document uploads, no account linking, about three minutes — produces a financial report card that is 99% accurate: letter grades across each area of their financial life, an overall picture of where they stand, and a prioritized set of plain-English action items. It's free for them, it's personal, and it's honest. People who have avoided "getting their finances looked at" for years complete it before their coffee cools, because it asks little and gives a lot.

> Every use case in this guide is the same mechanism pointed at a different moment: put the report card in front of someone, and the next conversation starts consultative.

## Getting to know — or getting to no

Before the use cases, here's the rant I give every advisor I talk to, because it's the whole model in one idea.

Every advisor thinks they have 200 prospects. The reality is you have 190 leads and 10 prospects — you just don't know which is which. So we spend our days fishing: discovery calls, follow-ups, "just checking in" — trying to find the ten real ones by talking to all two hundred.

The survey sorts them for you, both directions:

- **If they won't take it, you got to no.** Someone says "I want to work with you," you say "great — take this three-minute survey," and they don't do it? They just told you something a discovery call would have cost you an hour to learn: they're a lead, not a prospect. They're not ready. Nurture them and move on — no chasing, no guessing.
- **If they take it, you got to know.** Now you're not a salesperson fishing for pain points. You're both looking at the same report card. They failed estate planning — so that's where you start. The relationship skips the sales phase entirely and opens consultative.

> Either answer is a win. A fast no costs you nothing; a real know starts the relationship where trust usually ends up. What kills practices is the third state — not knowing — and the survey eliminates it.

## Use case 1: Prospecting with your own link

You get a co-branded report card experience you can put anywhere your practice touches the world — your website, email signature, seminars, webinars, referral follow-ups, social posts. Everyone who completes it walks away with real value carrying your brand, and everyone who wants to go further arrives at your door already graded, already aware of their gaps, and already convinced a plan matters. You're no longer hunting for the moment of need; the report card surfaces it.

## Use case 2: First meetings without the fact-finder

Send the survey with your meeting confirmation. When the prospect sits down, their grades are on the table — the financial picture that used to consume your first meeting is already assembled. You open with "here's how we raise these grades," and the meeting you used to spend on discovery becomes the meeting where you demonstrate advice. Advisors tell us this is the moment the relationship changes: you're not a salesperson qualifying a stranger; you're the expert they came to for answers.

## Use case 3: Annual re-grades that make your value visible

The hardest thing about great advice is that clients can't always see it working. Re-grading a client each year gives your reviews a natural agenda — what moved, what didn't, what's next — and turns your work into something a client can point to: grades that went up because of what you did together. It's retention built on evidence instead of inertia.

## Use case 4: The workplace and retirement-plan channel

If your practice serves retirement plans or employer groups, the report card becomes a financial wellness benefit you can offer every participant — not just the ones who show up to enrollment meetings. Employees get a personal result in three minutes with privacy built in (employers never see individual data), and you get engagement across the whole participant base, with planning conversations surfacing naturally from the grades.

## Use case 5: Education that runs between meetings

Every report card comes with plain-English action items and education matched to the household's actual gaps. Your clients learn between your meetings — from material aligned with their plan, not whatever the internet served them — so your time together goes to advice and decisions rather than explanation.

## Use case 6: The Advisor Matching Program

Everything above runs on your own funnel. When you want more consultative first meetings than your funnel produces, our Advisor Matching Program supplies them. Households across the country build report cards on Savology; when a report card shows a real need and a good fit, we introduce that household to one well-vetted advisor — with no obligation on their side, which is exactly why the conversations start warm:

- **Exclusive.** One introduction goes to one advisor — never a shared list, never a race to the phone.
- **Qualified by the report card.** Their needs are visible in the grades before your first conversation. Qualification isn't a form someone skimmed; it's demonstrated behavior.

- **Transparent, fixed pricing.** A simple fixed price per introduction. No bidding, no surprises.

## Getting started

The fastest way to see whether Savology fits your practice is a short conversation: we'll walk through the report card as your clients would see it, the co-branded experience, and — if you want it — how matching works in your market. Thirty minutes, no obligation.

**Book an intro call:** calendly.com/savadvisors/savology-adv-intro

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savology.com/advisors

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