



## case study

# Delivering personalized financial services with a simple “point and click”

### The Company

One of the nation’s largest and preeminent independent financial planning firms, Raymond J. Lucia Wealth Management Company provides personal financial management services for more than 6,000 clients nationwide. RJL’s core competencies include retirement income planning, asset management and portfolio design.

The founder and CEO, Raymond J. Lucia, is one of America’s top retirement experts and is the author of the best-selling financial retirement planning book titled *Buckets of Money*. Mr. Lucia also hosts a popular nationally syndicated radio talk show called *The Ray Lucia Show*, which is broadcast live in over 81 markets across the U.S. each day.

### The Need

The RJL Company maintains offices and has personal financial advisors in 28 cities across the U.S. In each office, the RJL advisors provide customized solutions and strategies to meet each client’s specific retirement and financial goals and needs. Throughout the planning process, it is often necessary to include the advice of other retirement specialists such as experts in tax planning, accounting and legal.

As the company has grown, one of its challenges was to find a way to deliver the personalized, hands-on service that the company is known for and to be able to continue to allow its founder, Ray Lucia, to meet face-to-face with as many clients as possible.

### The Solution

GBH Communications designed and installed a series of video and audio conferencing systems that linked the headquarters office with each of the company’s remote full-service local financial planning offices

“We didn’t know a lot about video conferencing, so we called GBH Communications. GBH consulted with us on the type of video units that we should be using in our various locations, recommended and set up the networks to connect and secure our various endpoints, and ran a detailed ROI analysis prior to us making our final decisions. GBH really helped get us there,” stated Ray Lucia Jr., Executive Vice President.

### The Benefits

The use of video conferencing provided the RJL company with the ability to have immediate access with clients, its team of financial advisors located throughout the country and the company’s key senior executive located in its headquarter’s office in San Diego.

RJL management can hold group conferences and make visual contact with any one of its financial advisors (RJL field sales force) in person each day at any time. Video conferencing allows each of the company’s financial advisors to schedule face-to face meetings with Ray Lucia, Sr. and the company’s senior advisors on a moment’s notice.

“People are enthralled with having the chance to meet and talk to our founder. With video conferencing my dad can sit in his headquarters in San Diego, “point and click”, and spend 10 minutes with a client in Phoenix, 10 minutes with a client in Los Angeles and 10 minutes with a client in Houston. Using video conferencing has allowed us to be able to deliver Ray Lucia and his advisors to thousands of clients and potential prospects with a simple ‘point and click.’ And our clients are just as excited to have this experience on video, as they would in meeting him live,” stated Ray Lucia Jr.

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“Providing personalized service is the cornerstone of the company’s mission and represents our key competitive advantage versus our competitors.” stated Ray Lucia, Jr., Executive Vice President of RJL Companies. “Our strategy for the future is to continue to leverage technology, including video conferencing, to maintain our ‘family feel’ with our customers and to grow our business now and into the future.”