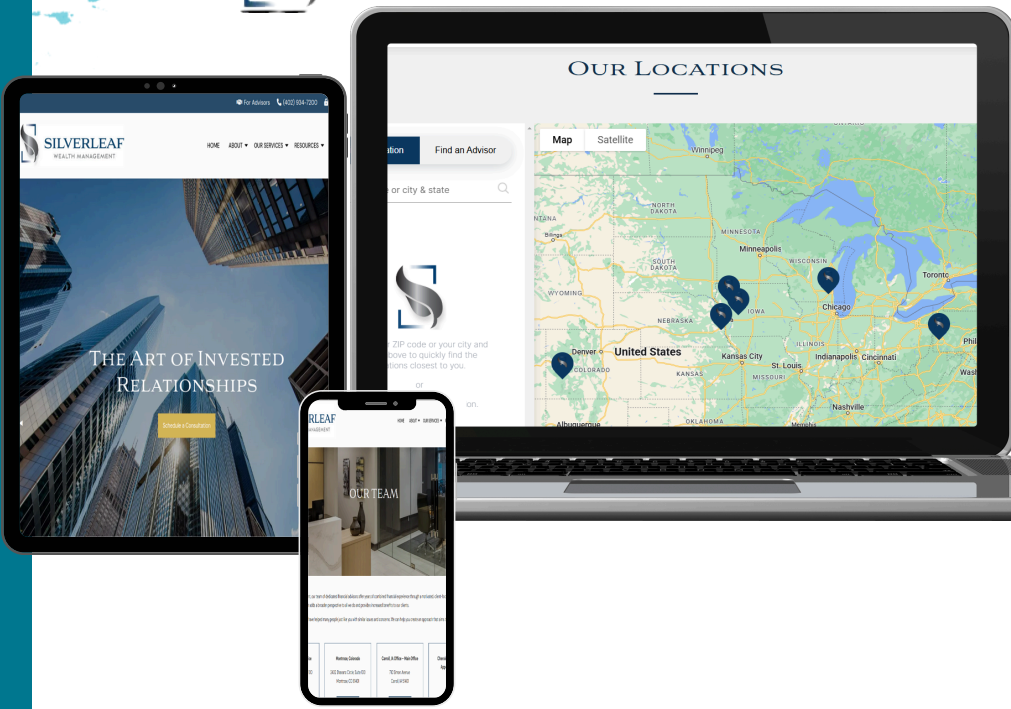


ShineForth Case Study

This technical case study showcases the successful collaboration between ShineForth and Silverleaf Wealth Management, a firm committed to delivering personalized investment management and strategic wealth planning services. Guided by a mission to serve as trusted advisors, Silverleaf prioritizes professionalism, education, and unbiased guidance to achieve long-term investment results, maintaining a team-centered approach built on trust and integrity.

To enhance their client experience, Silverleaf partnered with ShineForth to develop a custom map locator that highlights their advisors across the country. ShineForth seamlessly integrated this feature into Silverleaf's existing third-party website, delivering a tailored solution that supports their national presence.



Scan or click here to visit their site!



RESULTS

CHALLENGES



Enhanced User Experience Needs

The previous website lacked an intuitive design for users to find information about advisors, leading to frustration and reduced client engagement.



Limited Functionality of Third-Party Tools

The third-party website had restrictions that prevented Silverleaf from effectively showcasing advisor locations or customizing the tool to fit their branding and functionality needs.



Branding Consistency

Silverleaf wanted a map locator that aligns seamlessly with their branding and aesthetics, which a third-party tool might not have provided.

ENHANCED CLIENT EXPERIENCE

Clients can now easily locate and connect with advisors through an intuitive and visually appealing map. The streamlined navigation and interactive design provide a seamless user journey.

STRENGTHENED BRANDING

The tool seamlessly aligns with Silverleaf's professional image, reinforcing trust and credibility. It provides a consistent and polished visual identity, ensuring the platform reflects the company's commitment to excellence.

IMPROVED OPERATIONAL EFFICIENCY

By automating advisor searches, Silverleaf reduced time spent on manual inquiries. This allowed the staff to focus on higher-priority tasks, improving overall operational efficiency.

SCALABLE SOLUTION

The solution is built to grow with Silverleaf, easily updating advisor data and ensuring real-time synchronization. This scalability supports the company's expanding network of advisors while maintaining data accuracy.

Here is the reason why **WHY CHOOSE US**



"From the initial meeting ShineForth was engaged and focused on presenting a functional map for our website. They exceeded our expectations and timeline. Thoroughly impressed and will recommend going forward."

Renee Welch | Wealth Advisor & Director of Operations

Click here to get started today.

shineforth.co
(855) SHN-FRTH

