

# SUCCESS STORY

GROW VALUE. PRESERVE LEGACY. MAKE AN IMPACT.

## TRANSFORMING LEGACY PLANNING WITH CAPITALIZ

### Overview

David invested in Capitaliz in September 2024 after recognizing a need within his firm for tools to unify processes and validate planning recommendations.

With a dedicated focus on fee-for-service planning, **Capitaliz integration sparked significant revenue growth**, enabling him to expand his offerings.

### Launch of Legacy Planning Services

Early success with the software helped launch *Legacy Planning Services*, a separate and dedicated entity within the firm. Establishing a new service branch focused solely on legacy growth resulted in more deliberate strategic planning, effective client management, and streamlined processes.

David's success has positioned him to hire additional CPA support to further scale operations and manage increasing demand.

**This strategic move highlights the effectiveness of Capitaliz in facilitating practice growth and improving service delivery.**

### Capitaliz Impact on Practice Growth

#### Capitaliz Investment

- Fee for each active file on the platform: **\$2,100**

#### Phase 1: Initial Consultation Fee

- Business Insights Report (BIR): **\$9,000** fee for initial consultation

#### Phase 2: Ongoing Services Fee

- Ongoing planning support: **\$5,000** per month

#### Return on Investment: (per each client)

Phase 1 Clients:	\$9,000 -\$2,100	Initial consultation fee Capitaliz fee
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**= 329%**

Phase 2 Clients:	\$39,000 -\$2,100	Revenue for 6 months Capitaliz 6 month fee
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**= 1,757%**

#### Projected Growth



David estimates he's made **\$300,000** in revenue since integrating Capitaliz in **just six months** and is positioned to hire to support growth.

He's on track for eight phase 2 clients:

- **\$40,000** monthly recurring revenue (MRR)
- **\$480,000** in annual recurring revenue (ARR)

Book some time with our team at [capitaliz.com/get-started](https://capitaliz.com/get-started) to see how Capitaliz can help scale your business and drive opportunities for advisors.



## DAVID ORTIZ



### Director of Strategic Planning, Legacy & Succession

- Certified Exit Planning Advisor (CEPA)
- Certified Financial Planner (CFP)

/david-ortiz-exit-planner/  
 [legacysuccession.com](https://legacysuccession.com)

"We couldn't be doing what we're doing without Capitaliz."

It has taught me everything I need and given me the **confidence to drive meaningful engagements** with significant and valuable businesses."

## Capitaliz IMPACT:

### Value Advisors using Capitaliz can:

- Amplify focus and service offerings leading to greater success
- Manage flexible fee structures to enhance client value
- Position advisor specialization as a key practice differentiator
- Scale business with a platform that supports growth as demand increases