



CLIENT SUCCESS STORY

# Empowering Advisors to Focus on What Matters Most

How Navigate Wealth Helped a Solo Advisor Scale Efficiently and Deliver Big-Firm Resources

## Mary Meadows Livingston, CFA, CFP® | Abeona Wealth

Mary Meadows Livingston founded **Abeona Wealth** in 2020 to bring big-firm resources to her boutique practice. As a solo practitioner, she sought a partner who could streamline her operations while maintaining the personalized service her clients value.



### THE CHALLENGE

Launching a boutique wealth management firm presented unique hurdles. Mary Meadows needed a way to provide big-firm capabilities while operating as a solo advisor. She wanted to reduce risk for her clients and herself, streamline compliance and trading processes, and create scalable systems without sacrificing customization.

### THE SOLUTION

Navigate Wealth worked closely with Mary Meadows to implement systems and support that aligned with her vision for her business. From the start, they delivered a tailored approach designed to simplify operations, enhance efficiency, and enable growth.

They helped Mary Meadows get up and running on a sophisticated tech stack, including Salesforce and Tamarac, which made managing client relationships, trading, and reporting frictionless. Custom reports were created to fit her specific needs and branding, and their IT support ensured that everything ran smoothly and securely.

### THE RESULTS

Since partnering with Navigate Wealth, Mary has achieved:

- 100% Year-Over-Year Growth: Doubled assets under management and revenue annually over the past two years.
- Increased Efficiency: Streamlined operations allowed Mary to focus on client relationships and business growth.
- Work-Life Balance: Freed from time-consuming back-office tasks, Mary balances a thriving practice with time for personal pursuits.

“[Navigate Wealth] has allowed me to build the practice that I want and bring big-firm resources to my clients as a smaller, boutique solo practice.”

-- Mary Meadows Livingston, Abeona Wealth

Why Choose Navigate Wealth?

Navigate Wealth empowers independent advisors to:

- Scale efficiently with operational and technology support.
- Offer big-firm resources while maintaining personalized service.
- Focus on growth and client relationships without the burden of day-to-day compliance and operations.

Ready to grow your practice with confidence?

[Contact Navigate Wealth today.](#)

