



ceocfointerviews.com  
All rights reserved!  
Issue: December 25, 2017



CEOCFO Magazine

**Q&A with H. Adam Holt, CEO and Founder of Asset-Map, LLC. a solution for Financial Planners, Registered Investment Advisors, CPA Firms, Estate and Business Attorneys, Insurance and Tax Professionals Advising Clients on their Financial Structure**



**H. Adam Holt  
CEO & Founder**

**Asset-Map, LLC.  
[www.asset-map.com](http://www.asset-map.com)**

**Contact:  
H. Adam Holt  
888-664-8850 x6  
[info@asset-map.com](mailto:info@asset-map.com)**

**Interview conducted by:  
Lynn Fosse, Senior Editor  
CEOCFO Magazine**

**CEOCFO: *Mr. Holt, would you tell us about Asset-Map?***

**Mr. Holt:** Asset-Map is a solution for financial, investment, insurance and tax professionals that advise clients on their financial structure, to help visualize what is going on in their life and to facilitate a more visual conversation. Today's advice delivery is all about client engagement and focusing attention on relevant priorities. Most people are too busy to read 20-50 page traditional analysis from their advisors and therefore are not paying attention to the big picture of their financial decisions. Asset-Map is about creating quick clarity of everything that matters in that decision process.

**CEOCFO: *What types of information can you gather?***

**Mr. Holt:** The information you gather in Asset-Map creates a high level visual framework for all the people and entities that clients are financially responsible for/to and all the financial decisions they are currently making or expect to have happen in the future. The idea is that an Asset-Map can include not only the traditional families like partners and spouse or children, but other family members that are dependent potentially, business partners, employees and all those one might have any financial relationships with. In addition, advisors can include the companies, trusts and instruments that people traditionally create as their wealth gets more complicated. Asset-Map can also display that information in a client centric view with all the income sources, assets, liabilities and insurance policies that an individual or company might own or control, Asset-Map creates a visual picture of the financial structure that represents the current household.

**CEOCFO: *How are you gathering all the information?***

**Mr. Holt:** There are three ways to get data into the Asset-Map Platform. The most common way is that all professionals, in some measure, interview prospective and existing clients on an ongoing basis to do what the industry calls "KYC" or Know Your Client. Typically, you cannot provide good consultation or advice without knowing the facts. So, every professional has a mandate to collect and validate these facts before providing guidance. In the financial services industry that is a heavily regulated process, and there actually is an audit trail required, so we are satisfying elements of those regulatory and compliance requirements.