eMoney

About eMoney

eMoney provides technology solutions and services that help people talk about money. Rooted in comprehensive financial planning, eMoney's solutions strengthen client relationships, streamline business operations, enhance business development and drive overall growth. More than 70,000 financial professionals across firms of all sizes use the eMoney platform to serve more than 4 million households throughout the U.S.

Our Mission
Helping people talk about money

Our Vision
Financial peace of mind for all

Our Story

Founded in 2000, eMoney's initial products – an advisor dashboard, aggregator and document vault – were the first on the market to transform the financial planning experience and help financial services catch up to other industries using interactive, collaborative technology. In 2015, eMoney was acquired by Fidelity Investments, and Ed O'Brien was named CEO a year later. Under his leadership, the firm has nearly tripled in size, increased its product offering, expanded its client base and welcomed hundreds of new team members across the country to contribute to eMoney's success.

Our Leadership Team

Ed O'Brien
CEO

Nick DiLisi
Head of Technology

Jess Liberi
Head of Product

Susan McKenna
Head of Marketing

Megan Murray
Head of Finance

Jason Reiser
Head of Legal and Risk

Matt Schulte
Head of Financial Planning

Frank Tropiano
Head of Client Services

Joanne Del Signore
Head of People Experience

eMoney at–a–Glance

$2.7T
Aggregated Assets

1.8M
Client Sites

16M
Aggregated Accounts

70K+
Financial Professionals

5M
Financial Plans

67
Enterprise Clients

4.3M
Households

An Integrated Platform to Build and Sustain Long-term Client Relationships

Our comprehensive solutions address all areas of managing and developing your business.

Planning

- Goal-based planning
- Cash flow planning
- Modeling and simulations

Business Management

- Compliance
- Advisor and firm-wide analytics

Access

- Third-party integrations for account aggregation

Business Development

- Lead generation and collection
- Marketing resources

87%
of eMoney clients saw an improvement in business efficency.

79%
of eMoney clients have seen an improvement in client retention since using eMoney

85%
of eMoney clients saw a return on investment in less than 12 months[1]

[1] eMoney ROI Survey, Tech Validate, March-April 2019

Media Contact

Joanna Armandi, Corporate Communications, eMoney:
jarmandi@emoneyadvisor.com | 215.990.1469