DIGITAL ADVICE

Custom Managed Platform Co-developed with Fidelity

Manage digital and fully advised clients side-by-side through a planning-led solution.

Fully Integrated

Provide clients with a streamlined, digital experience, with straight-through account opening and funding through Fidelity's brokerage capabilities.

Flexible

Empower clients to drive the planning process through engaging, self-guided tools while you control key risk and investment criteria.

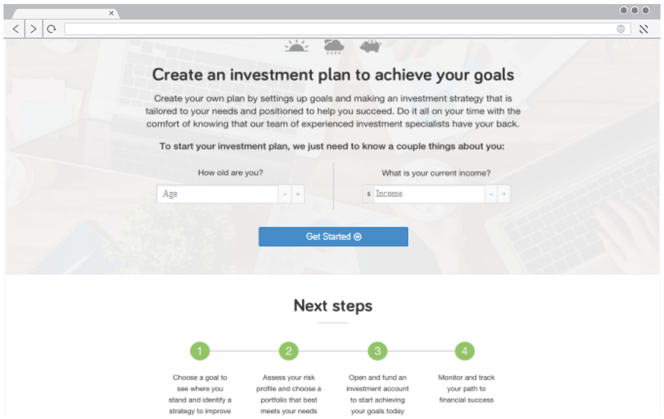
Future-ready

Attract and prepare for prospects with emerging wealth through a modern experience for tech savvy investors.

eMoney

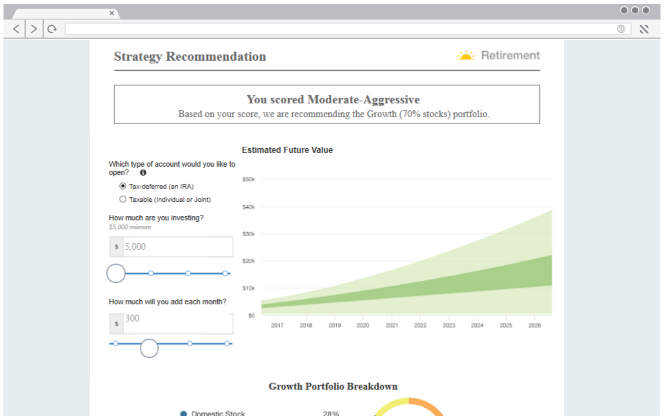
A Planning-led, Custom Built Solution for Firms and Advisors

1. ENGAGE



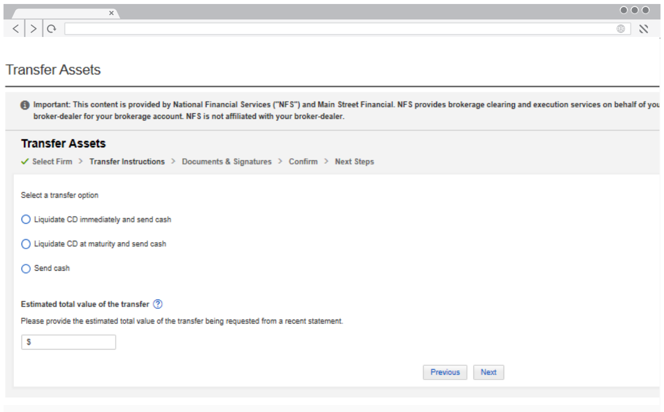
- White label the Client Portal.
- Enable clients to complete the on-boarding process quickly.

2. PROFILE/PLAN



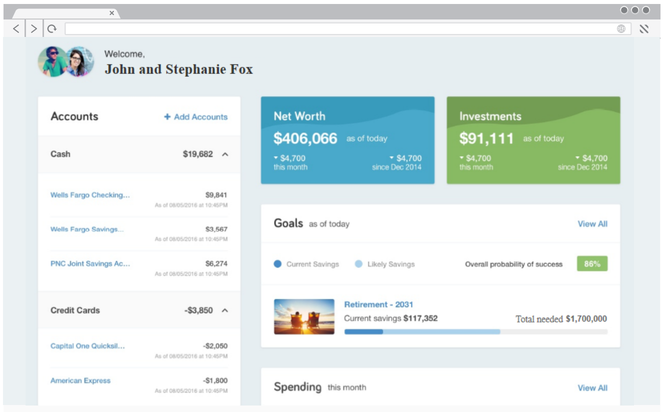
- Configure the risk tolerance questionnaire and assign risk scores to models.
- Allow clients to easily aggregate accounts, start planning, and vary inputs to assess potential impacts.

3. FUND / INVEST



- Provide a clear and easy path to fund the plan.
- Enable clients to open accounts online, transfer assets, and use electronic fund transfers.

4. MANAGE



- Receive alerts on key client activity.
- Automate rebalancing and fee billing.

Contact us at 888-362-8482 for more information.