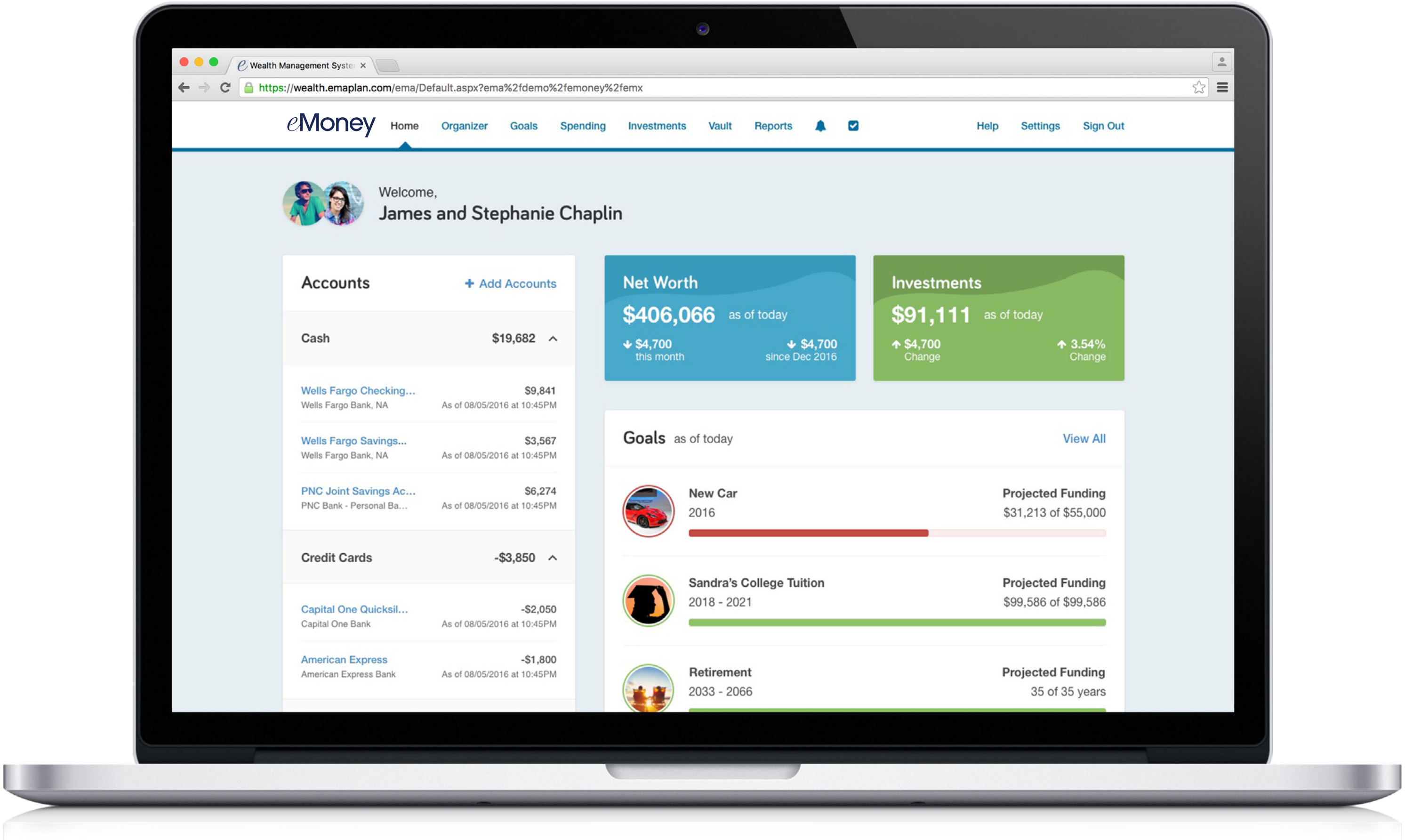
eMoney

CLIENT PORTAL

Be the Center of Your Client's Financial World



Organize. Collaborate. Empower.

ORGANIZER
Connect all your clients' accounts for a consolidated view of their entire financial pictures.

GOALS
Empower your clients to explore potential changes to their goals and track their progress toward reaching them.

SCREEN SHARING
Easily join a screen sharing session for interactive planning discussions anytime, anywhere.

MOBILE
Provide clients with a fully-branded, mobile experience.

TRACK SPENDING
Track spending habits, monitor cash flow, and help clients stay on the right financial path.

INVESTMENTS
Interactive charts and detailed summaries increase your clients' knowledge of their financial accounts.

BUDGETING TOOLS
Help your clients set budgets and reach savings goals.

VAULT
Allow clients to safely store all their important files, and access them directly through eMoney.

Want to learn more? Visit us at emoneyadvisor.com or call 888-362-4612 to schedule your free trial.