eMoney

Financial Planning Solutions

to Keep You at the Forefront of the Industry

At eMoney, we are changing the conversation surrounding financial planning to help people talk about money. As the leading provider of scalable wealth management solutions, we enable financial professionals, firms, and enterprises of all sizes to build stronger and more collaborative client relationships, streamline business operations, and drive revenue and growth.

Our Mission

Helping people talk about money

Our Vision

Financial peace of mind for all

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

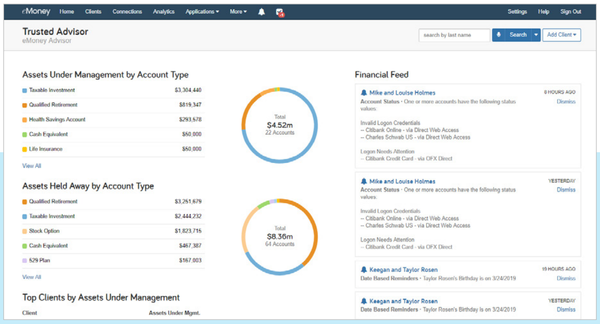
- Third-party integrations for account aggregation

Business Development

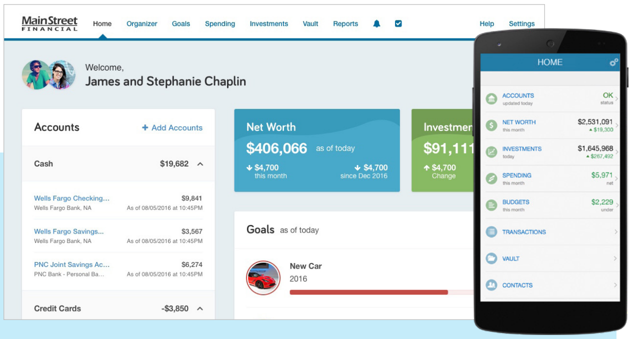
- Lead generation and collection
- Marketing resources

eMoney

Engaging Clients With Collaborative Planning Experiences



Access customizable views into your book of business, stay on track with alerts, and host client conferences with the **Advisor Dashboard.**



Offer clients personalized, real-time, on-demand financial experiences that deepen engagement and keep you ahead of digital trends through our best-in-class **Client Portal.**

A Trusted Partner to Advisors

For nearly two decades, we've been committed to innovation that drives transformation. We've worked side by side with more than 63,000 financial professionals across firms of all sizes to serve nearly 4 million households throughout the U.S.

You are dedicated to helping clients achieve their financial goals, and we are focused on providing you with the tools to make that happen. And we're proud that:

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

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].

To learn how you can improve your clients' planning experiences, visit our website to schedule a free trial: www.emoneyadvisor.com

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