

# Solutions to Grow and Scale Your Business

You shouldn't have to worry that your clients are going to outgrow your software. With scalable solutions that meet a broad range of planning needs, you'll always have the right tool for any situation. Choose a package that aligns to the type of planning you offer today and will keep your clients happy and engaged tomorrow.

## Which option is right for you?

### PLUS

Leverage Foundational Planning's intuitive, streamlined, goals-based solution to build more planning-led relationships and deliver more plans to more clients

**INCLUDES:**

- Platform
- Advanced Analytics
- Foundational Planning

### PRO

Harness Advanced Planning to provide the most comprehensive cash-flow based capabilities to accommodate clients' most complex planning needs

**INCLUDES:**

- Platform
- Advanced Analytics
- Advanced Planning

### PREMIER

Combine Foundational Planning and Advanced Planning for a truly integrated solution that enables planning for all clients regardless of financial situation, on a single platform

**INCLUDES:**

- Platform
- Advanced Analytics
- Foundational Planning
- Advanced Planning

### GROWTH

Supercharge the growth of your planning business with an integrated marketing solution that makes it easy to attract prospects and create plans—all from one place

**INCLUDES:**

- Choice of Planning Package + Bamboo

Learn what's included in Foundational Planning and Advanced Planning through the product comparison below.



<b>Features</b>	<b>FOUNDATIONAL PLANNING</b> Available in Plus and Premier	<b>ADVANCED PLANNING</b> Available in Pro and Premier
Cash Flow Planning		✓
Goal-centric Planning	✓	
Education Planning	✓	✓
Retirement Planning	✓	✓
Investment Planning	✓	✓
Stock Options		✓
Tax Planning		✓
Estate Planning		✓
Insurance Planning	✓	✓
Custom Capital Market Assumptions	✓	✓
Monte Carlo Based Results	✓	✓
Stress Tests		✓
Reports	✓	✓
Custom Presentation Templates		✓
Bamboo	Add-On	Add-On
Advisor Assurance	Add-On	Add-On

## eMoney's Platform includes:

Account Aggregation	✓	✓
Client Portal	✓	✓
Client Onboarding	✓	✓
Third-party Integrations	✓	✓
Screen Sharing	✓	✓
Digital Lead Capture	✓	✓
Unlimited Digital Document Storage	✓	✓
Award Winning Customer Service	✓	✓
Alerts, Alarms and Tasks	✓	✓

