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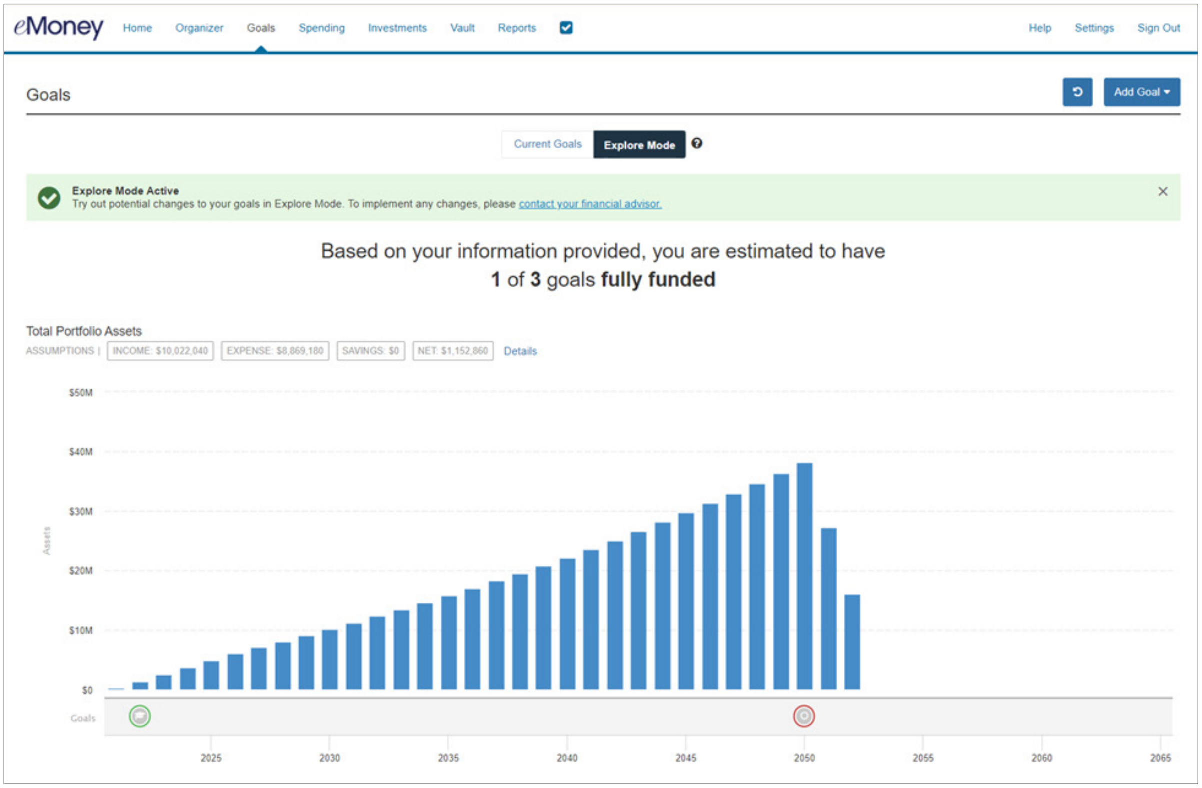
Improve Client Engagement and Collaboration with Explore Mode

With eMoney Explore Mode feature, your clients can try out potential changes to their goals whenever they want through their personal Client Portal, without altering the Base Facts of their current financial plan.

You can then see your clients' Explore Mode considerations in Decision Center, Goal Planner, or Advanced Planning, and gain insights into what's on their minds, fostering more effective collaboration.



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Frequently Asked Questions

What's the advantage of Explore Mode?

Explore Mode makes it easier for your clients to explore the impact of changes to their goals without altering the base facts of financial plans already developed with their advisor.

Clients can try out changes whenever they want and share their current thinking with you. These insights can then spark more timely and informed client conversations, and deepen client engagement.

How to my clients see Explore Mode?

When Explore Mode is enabled, your clients will see a new toggle option for *Current Goals* or *Explore Mode* at the top of their Goals summary page.

When your clients select Explore Mode, they can add or edit their goals to see the impact of the potential changes, without altering the base facts of their existing plan.

At the top right of the display, end-users can select *Add Goal* to add additional goals. They can also select the undo/go back button to discard their Explore Mode changes.

How do I enable Explore Mode for my clients?

To activate Explore Mode for existing clients, go to *Manage Client* Website settings under *Goals.* The Explore Mode default setting is automatically set to *Enabled* for any new clients.

How do I see my clients' Explore Mode activity?

When clients save Explore Mode changes, a new *Client Site Planning Explore Mode* goal displays under *Scenarios* in the *Plans* tab.

You can view and edit the Explore Mode goal in Decision Center, Goal Planner, and Advanced Planning to prepare for a future conversation. Any changes you make in the Explore Mode goal will be reflected on both your advisor site and your client's view.

You can also set up an Explore Mode alert. When your clients edit their goals in Explore Mode, you'll be notified after each edit.

Are there any Explore Mode capability differences between my Foundational Planning and Advanced Planning clients?

Yes. Although all clients can use Explore Mode, Foundational Planning clients can edit an existing goal, but cannot add or remove goals. Advanced Planning clients can edit, add or remove goals. This helps ensure your clients' Explore Mode goal planning capabilities does not exceed that of your own.

I've given my clients editing rights to the base facts in their plans. Will that affect Explore mode?

No. Your clients can edit goals in Explore Mode regardless of the plan editing settings established by their advisor.

How do I explain Explore mode to my clients?

Here are a few talking points:

- With Explore Mode, you can edit your goals in your personal portal and see the impact of those changes immediately, and whenever you want.
- For example, you can see how your financial picture will be impacted by increasing your savings by 10 percent. Or how long it would take to make a dream purchase you've been considering.
- The best part is that it won't affect anything we've built together—Explore Mode has no impact on your existing plan or facts.

You can also share this one-page guide with your clients.

Where can I learn more?

You can learn more by searching for Explore Mode topics in the Help Menu or contacting Client Support at 888.362.8482 (press 1 for Customer Service and Technical Support).