*e*Money

INTEGRATIONS Work Smarter, Not Harder

Powerful integration options from eMoney Advisor. At eMoney Advisor, we work with a number of the industry's most prominent software providers to deliver powerful integration options for our financial advisors. The result is an industry-leading, comprehensive wealth management system that gives you the ability to simplify your day-to-day operations while maximizing your value.



- Client and Account Importing
- Vault Storage
- Easily move between platforms



Black Diamond[®]

WEALTH PLATFORM

· Bi-directional single sign-on



- Single sign-on
- Report generation · Client and account importing



- Access Box in eMoney
- Document transfers



Single sign-on

Single sign-on

Portfolio linking

Vault storage

Report generation

- 😺 Dropbox
- Access Dropox in eMoney
- VESTNET amarac



- Single sign-on
- Report generation

Fidelil



MoneyGuidePro[®]

- Single sign-on (Workstation only)
- Report generation

- Account data feed
- Vault storage of QPRs
- Proposal generation
- Account data feed
- Client site single sign-on

- Vault storage & Client Site eDelivery



ENVESTNET[®]

- - Single sign-on
 - Client and account importing
 - - Single sign-on
 - Client and account importing
 - Account opening
 - Performance data
 - · Single sign-on

ADVISOR WORKSTATION

Advisor and client single sign-on Plan generation and Vault storage Bi-directional assets under

management and held away sync

Client information sync

Zone snapshot

MoneyGuidePro Confidence

- Single sign-on
- Client site single sign-on



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INTEGRATIONS

Work Smarter, Not Harder







CL	I	New ways.
SEI		New answers.

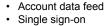
- Single sign-on
- (Workstation only) Report generation
- Import client personal details, assets, liabilities, and insurance policies
- Single sign-on
- Client Risk Number visibility
- Portfolio Risk Number visibility
- **Riskalyze Risk Tolerance** questionnaire
- Account information exporting
- Single sign-on
- Client importing
- Report generation



- Single sign-on
- Client importing
- Bi-directional client information sync







- Client importing
- Report generation
- Performance data
- · Vault storage
- Single sign-on
- Client importing
- Account data feed
- Bi-directional client information sync
- Bi-directional notes sync

One time password

- Bi-directional tasks sync
- liew Gateway

Veo

Integrated

- Single sign-on Vault storage with multi-linking
 - capabilities
 - Single sign-one
 - Vault Storage with multi-linking capabilities



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